

Delaware | 2007 VISITOR PROFILE





How to Read This Report	3	Positioning	
Study Specifications and Definitions	7	Purpose of Trip	31
Market Assessment		Travel Party Composition and Size	35
Delaware		Trip Length	39
Person-Trips Volume - Day & Overnight	11	Average Daily Spending Per Person	43
Person-Trips Volume - Business & Leisure	12	Activities	45
Volume Change	13	Mode of Transportation	52
Person-Trips Volume Summary	14	Trip Timing	53
Satisfaction and Value Ratings	15	Accommodation Type	60
Targeting		Communicating	
Age	18	Visitor Origin Markets (States, DMAs)	64
Children in Household	21	Travel Distance	70
Household Income	22	Appendices	
Occupation	23	A Methodology	73
Household Lifestage	24	B Questionnaire	83
Generation	27	C Travel Industry Overview	89

How to Read this Report



The report you are about to read is a comprehensive analysis of the travel market in the U.S. and Delaware. After reviewing this report, it is DKSA's intention for travel marketers and planners to be better armed with the intelligence they need to develop tourism marketing strategies that will attract new visitors and provide a travel experience that will earn repeat visits and referrals.

The body of this report is divided into four main sections – *Market Assessment*, *Targeting*, *Positioning*, and *Communicating* - which are further targeted to various roles within the tourism organization.

MARKET ASSESSMENT – *How many visitors does Delaware attract?*



This section of this report will give the reader not only an understanding of the size and scope of the tourism market in the U.S. as well as the destination itself, but also helps destinations understand past market movements and prepare for possible changes in the future. This information enables the client to compare its ability in capturing market share to the destination's Competitive Set.

The section ends with a review of traveler satisfaction and value ratings of Delaware. The ratings are compared to the Competitive Set using the U.S. as a benchmark and will give destinations' competitive intelligence on consumer perceptions of travel satisfaction and value.

TARGETING – *Who are Delaware's most important visitors?*



This section provides a demographic analysis of travelers to help travel marketers and planners to better focus their communication activities by identifying the largest market segment. The following slide represents three ways to analyze traveler demographic profiles and their recommended uses for marketing:

How to Read this Report



VARIABLES	CHARACTERISTICS			RECOMMENDED USE
Demographics	Segmented by age, income and household			A fundamental description of travelers that can be used for all marketing and communication vehicles
Lifestages	Age of the Household Head	Household Income	Children under Age 18 in Household	A discriminating segmentation of target audience for media targeting, CRM among others
Young & Free	18-34 years	any	no	
Young Family	18-34 years	any	yes	
Maturing & Free	35-54 years	any	no	
Moderate Family	35-54 years	Under \$75K	yes	
Affluent Family	35-54 years	\$75K or higher	yes	
Moderate Mature	55 years or older	Under \$60K	no	
Affluent Mature	55 years or older	\$60K or higher	no	
Lifestage analysis combines three variables - age, household income, and presence of children in the household - into one variable containing seven mutually-exclusive segments defined above. Because of the age component, the lifestage segments are “moving targets” from year to year.				
Generations	Traveler’s Year of Birth			A focused messaging approach that uses different mediums (radio, TV, and Internet) to target a specific audience
Millennial	After 1981			
Gen X	1965-1980			
Boomers	1946-1964			
Silent	1930-1945			
GI	1929 and earlier			



POSITIONING – *How should Delaware position its product?*

This section will help a destination compare its tourism product attributes against the Competitive Set. These attributes include a traveler's purpose of visit, travel party composition, activities participated in at the destination, and repeat visitation.

This intelligence highlights a destination's product strengths that can be promoted to attract new travelers or repeat visitors. It can also help destinations better differentiate themselves in a competitive travel market.



COMMUNICATING – *Where should Delaware advertise and promote?*

The Communicating section assists travel marketers and planners in focusing on key markets that generate the largest share of visitors. This section will direct a destination to launch marketing communications programs to markets where they are most likely to convert 'lookers to bookers.'

Several origin market geographies are analyzed to provide a comprehensive overview of where their visitors reside. The following describes these geographies:

- U.S. Census Bureau - groups U.S. states into nine regions for statistical reporting purposes. These regions are based on purposes established in 1910 and are provided here for comparison to other Census data.
- DMAs or Designated Marketing Areas - defined by Nielsen Media Research, Inc, denote a geographical area consisting of a primary city and surrounding county or counties. There are 210 DMAs in the U.S. Each DMA represents a unified geographic media market. Every U.S. county is in one and only one DMA.

The Communicating section also provides an analysis of the destination's Competitive Set and its respective share of key origin markets. This analysis helps to assist a destination know where their visitors travel and thus arming destination marketers with a strategy to lure visitors away from the competition.

How to Read this Report



Each of the four main sections – *Market Assessment*, *Targeting*, *Positioning*, and *Communicating* – is further divided into two sub-sections:

- **Detailed Data Graphs:** The detailed data graphs present the data in two primary ways.
 - The destination's visitor performance compared to the U.S. and the Competitive Set
 - The destination's segments' average party per trip spending performance, and
 - A comparison of the segments' share of all travel party members at the destination to their spending contribution in the market.



Study Specifications and Definitions



- Methodology – All of the information contained in this report is derived from DKSA *DIRECTIONS*® tracking system.
- Objective – Describe the domestic Leisure travel market in Delaware compared to the U.S. and Competitive Set.
- Travel definition – An overnight trip or any day-trip greater than 50 miles one-way from home
- Sampling Frame – All U.S. domestic Leisure travelers on combined mail and online panel during 2005-07 in the following destinations:
 - Delaware
 - Competitive Set (New Jersey, Pennsylvania, Maryland, Virginia and New York)
- Timeframe – 2005-07

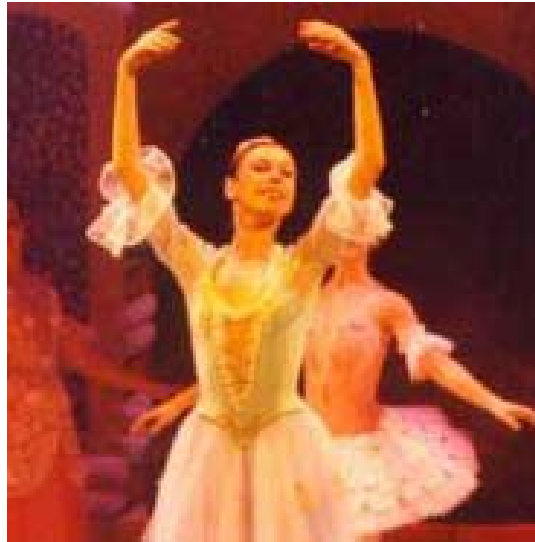


Background

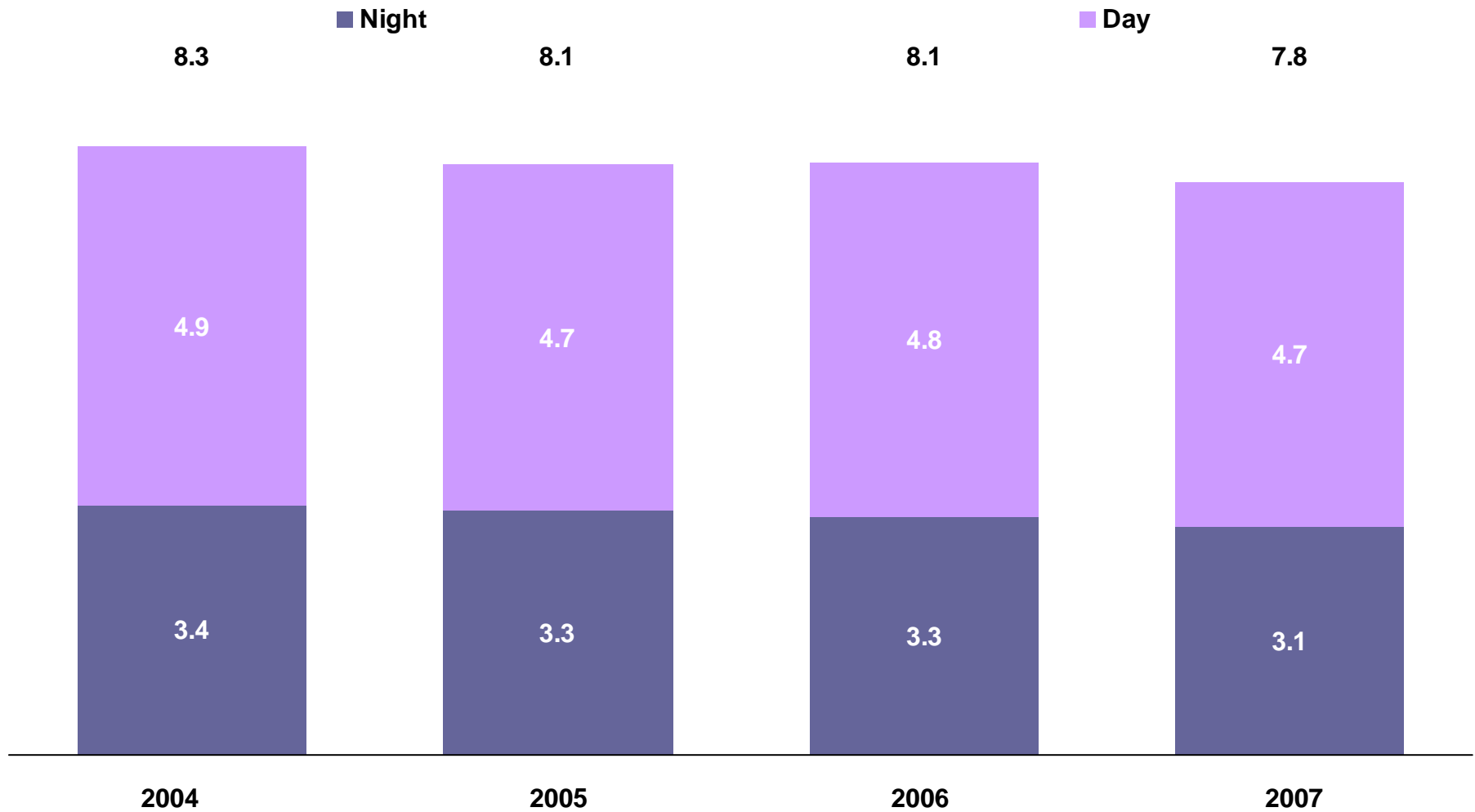
This Delaware visitor study provides intelligence on U.S. and Delaware travel trends from 2007. Information is also provided for each of five competing destinations. Volume and profile data are from D. K. Shifflet & Associate's *PERFORMANCE/Monitor*SM Travel Intelligence SystemSM — the largest travel-tracking system in the U.S. The 2007 Delaware Leisure visitor profile is based on a sample of 950 households. Appendix A contains details on study methodology and definitions of terms such as Person-Stays and Person-Days.



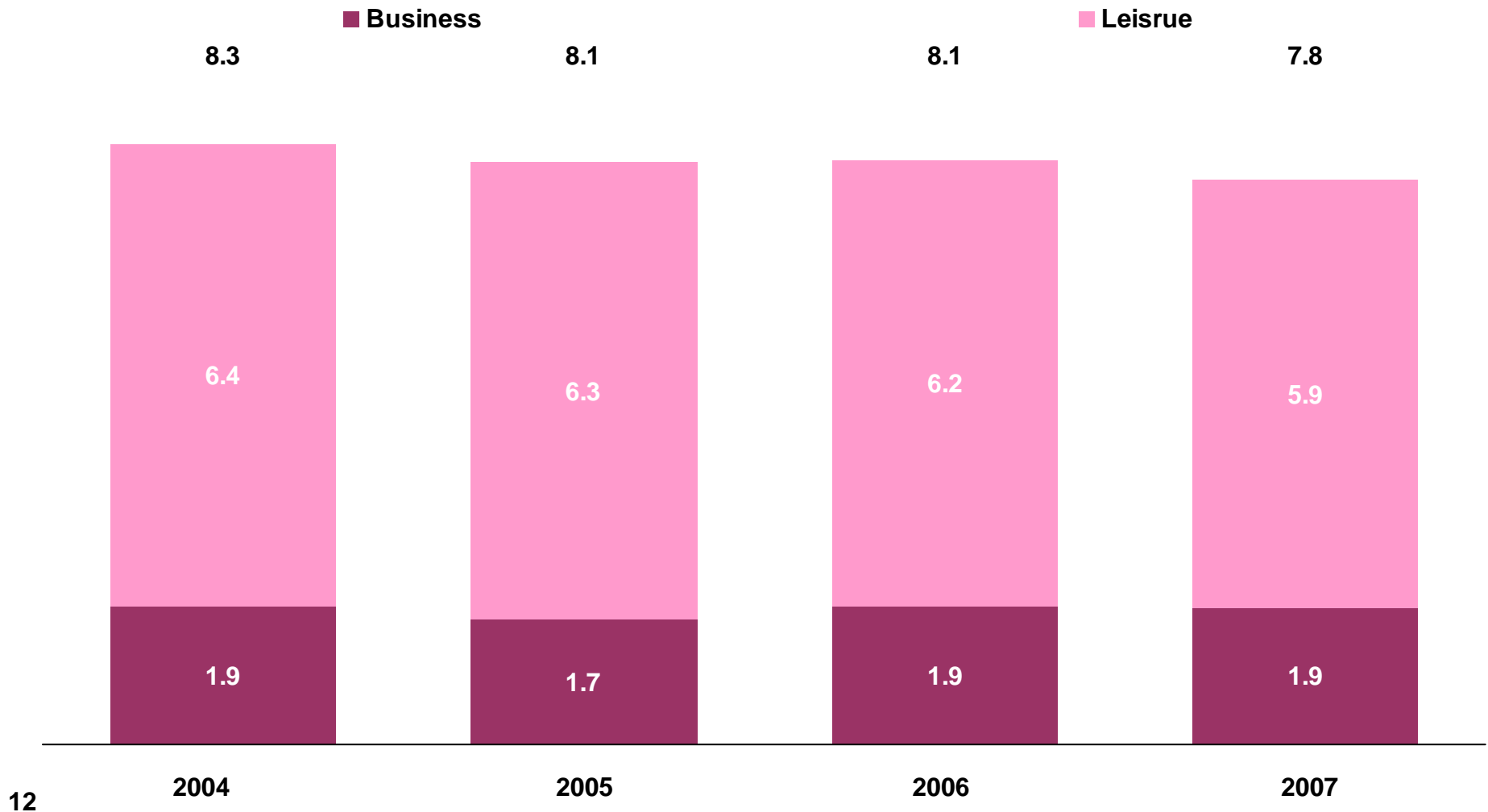
Delaware Detailed Findings



Delaware Person-Trips Volume (Million)



Delaware Person-Trips Volume (cont.) (Million)



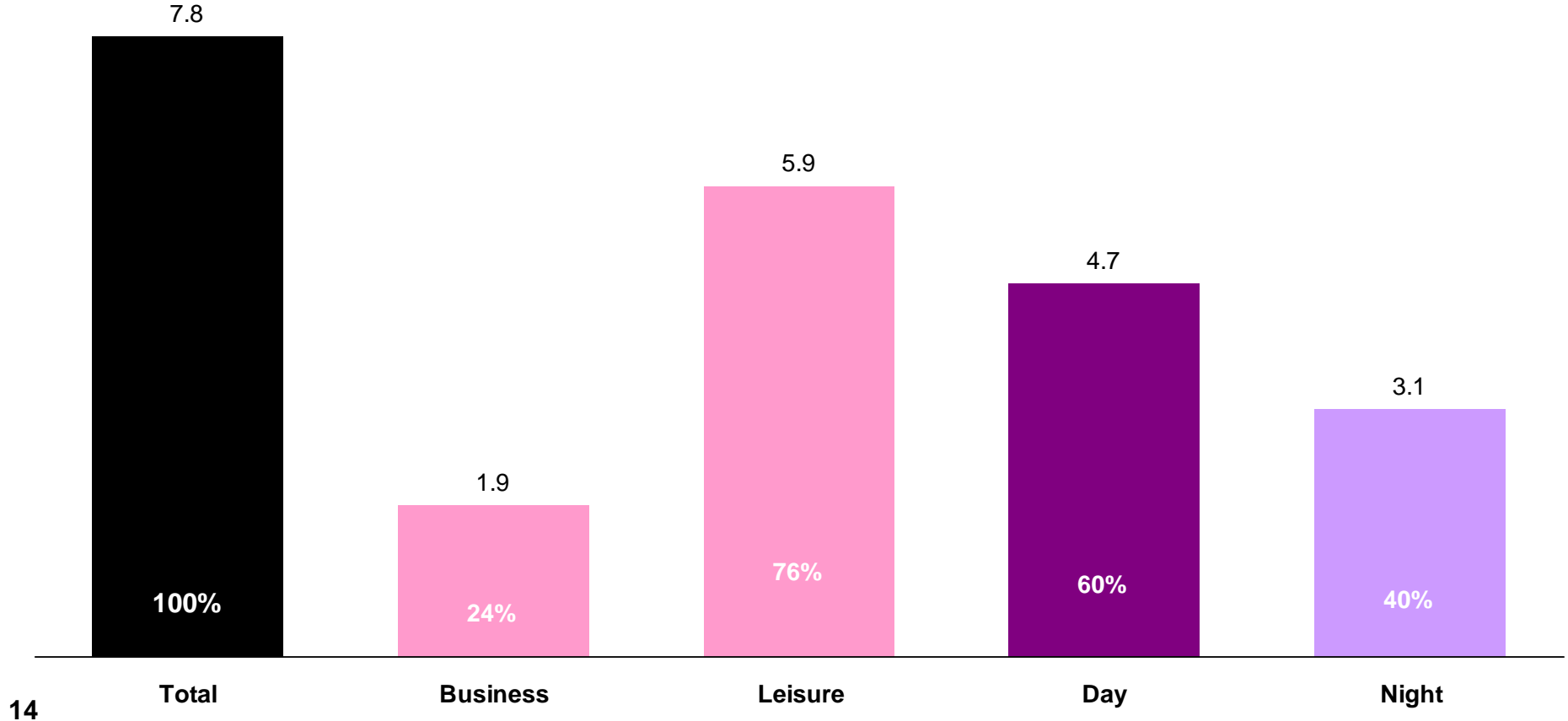
Delaware Stays Volume (% Change)



This table shows the year-to-year percent changes in Person-Trips volume for each of the primary travel segments.

	05/04	06/05	07/06	U.S. 07/06
Total	-3.0%	0.2%	-3.2%	-0.1%
Business	-9.6%	9.8%	-0.7%	-1.2%
Leisure	-1.0%	-2.4%	-4.0%	0.3%
Day	-3.9%	2.2%	-2.5%	-2.1%
Night	-1.8%	-2.5%	-4.3%	2.1%

Delaware Person-Trips Volume Summary (Million in 2007)



Destination Satisfaction/Value Intelligence



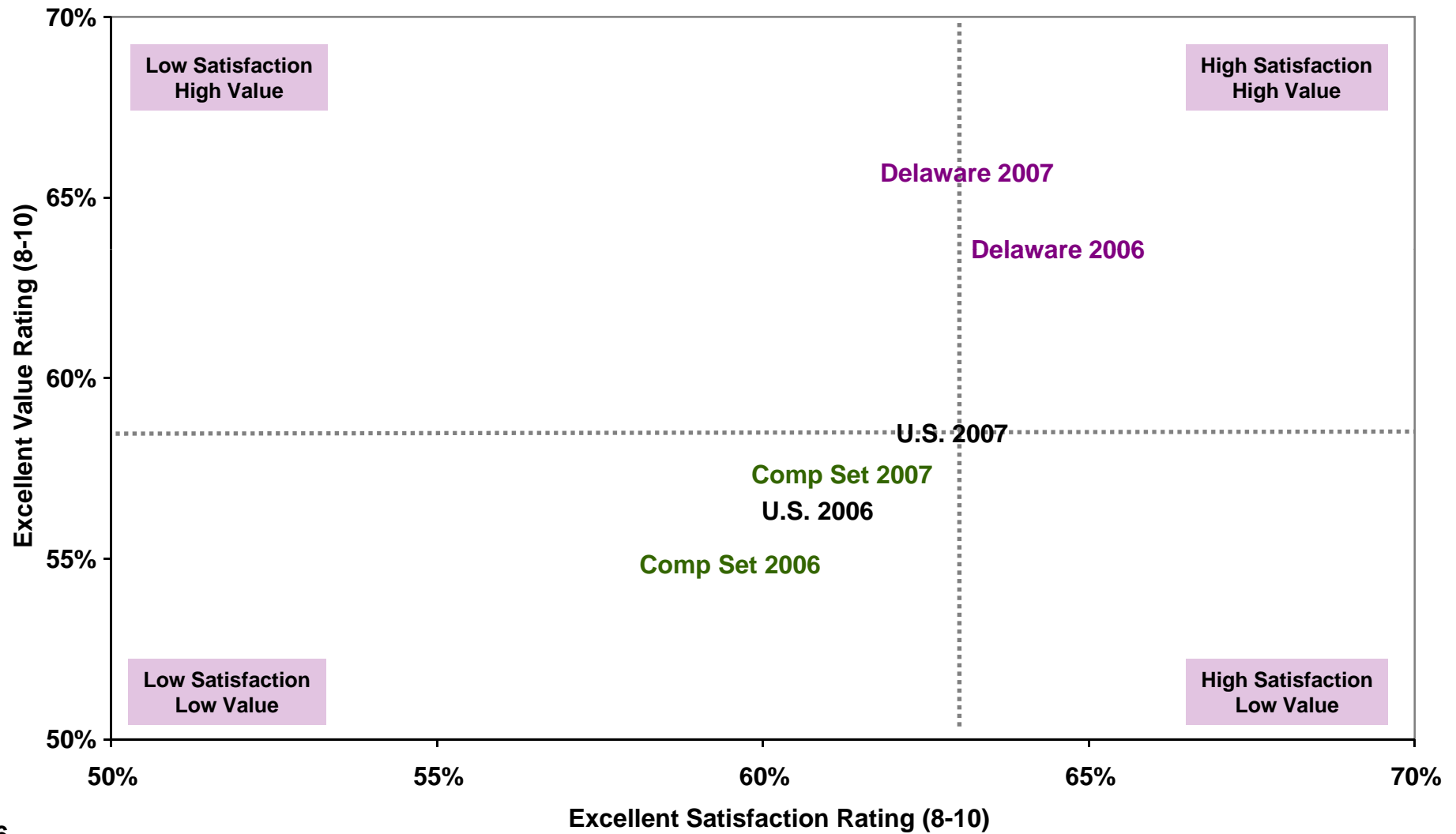
- In DKSA's *PERFORMANCE/Monitor*SM, respondents are asked to rate their stays on the destination overall satisfaction and overall value-for-the-money on a 10-point scale, where 1 is lowest or "poor" and 10 is highest or "excellent".
- The following chart shows the destination and each of its travel segments' satisfaction and value ratings. The chart plots the percentage of top three (net) ratings which are considered "high" ratings.
- The matrix shows the location of each destination in relation to the four combinations of low or high satisfaction, and low or high value. The four combinations create quadrants using the nationwide averages for high satisfaction and high value ratings.

Low Satisfaction, High Value	High Satisfaction, High Value
Low Satisfaction, Low Value	High Satisfaction, Low Value

- Destinations falling into the High Satisfaction, High Value quadrant have the most loyal visitors. Those visitors are most likely not only to return, but also register higher per stay spending and are most likely to provide invaluable word-of-mouth by recommending the destination to others.



Excellent Destination Satisfaction vs. Value Ratings: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2006 vs. 2007)



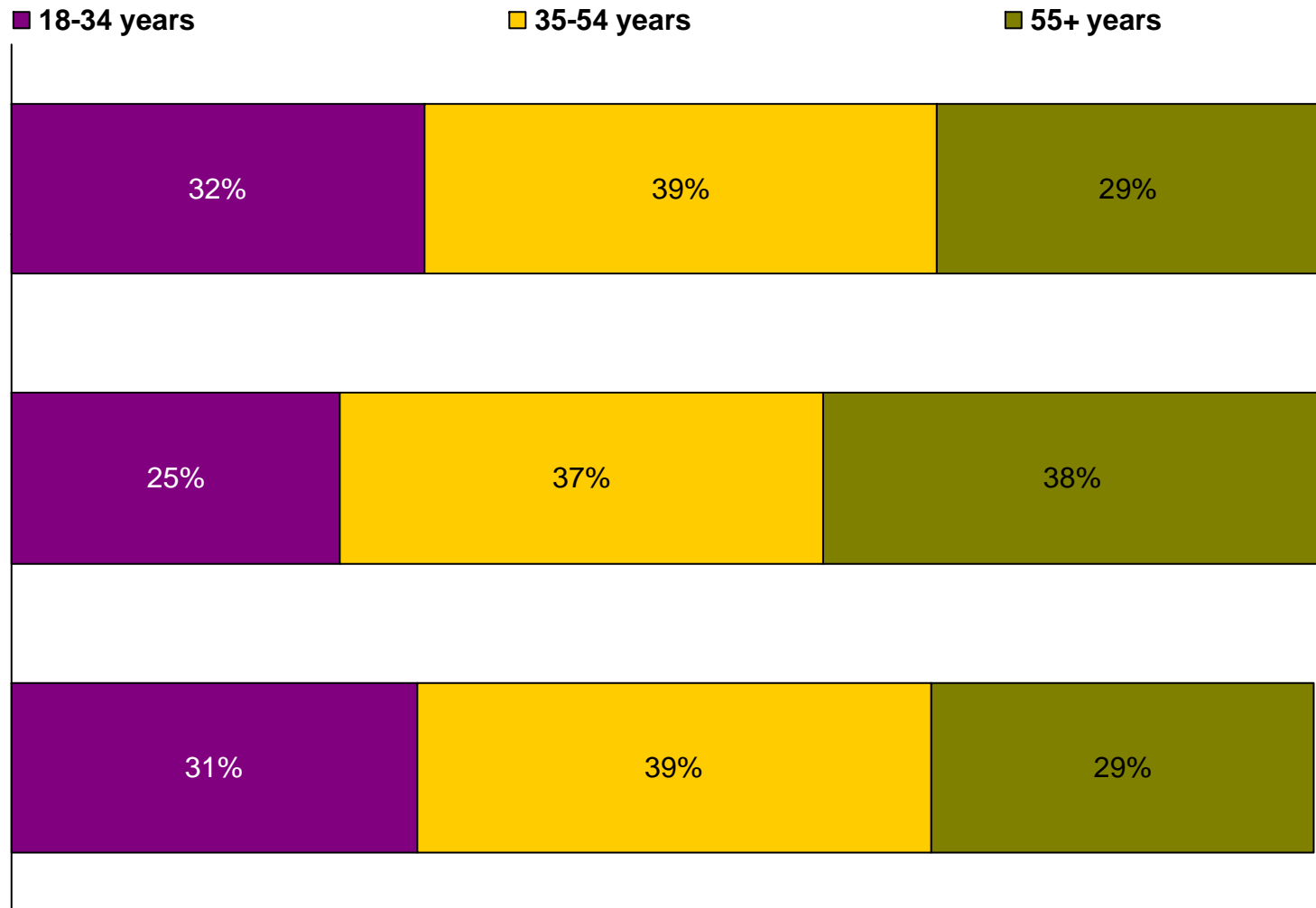




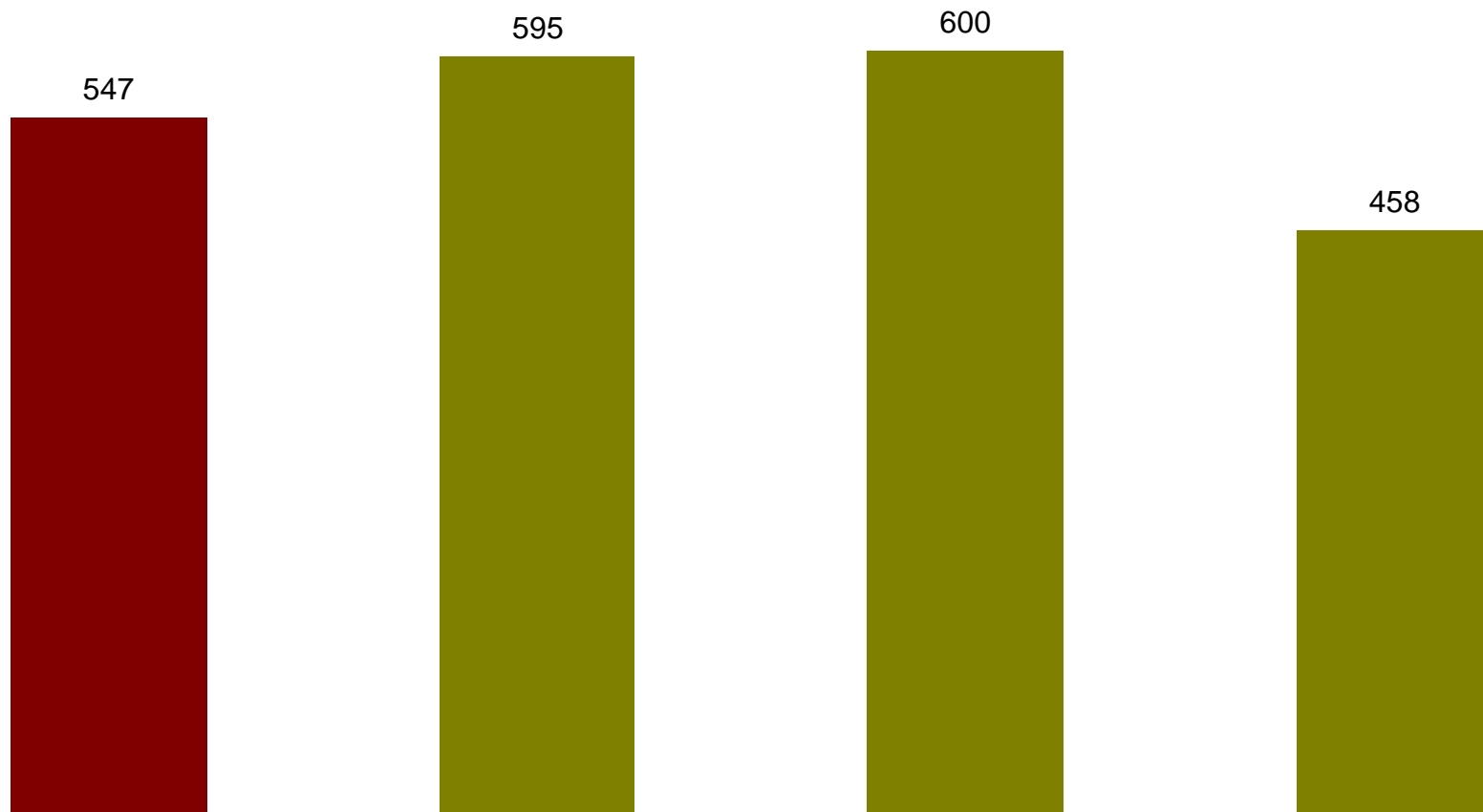
Age Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Average



Delaware Avg. Party per Trip Spending by Age (\$ Leisure Trips in 2007)

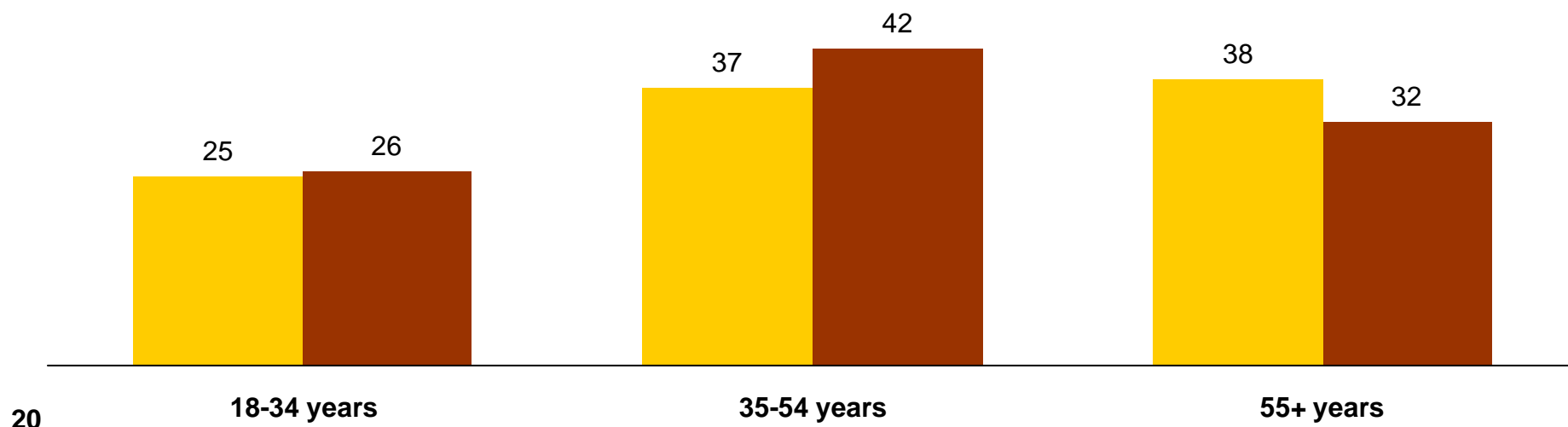


Delaware Age Comparison (% of Leisure in 2007)

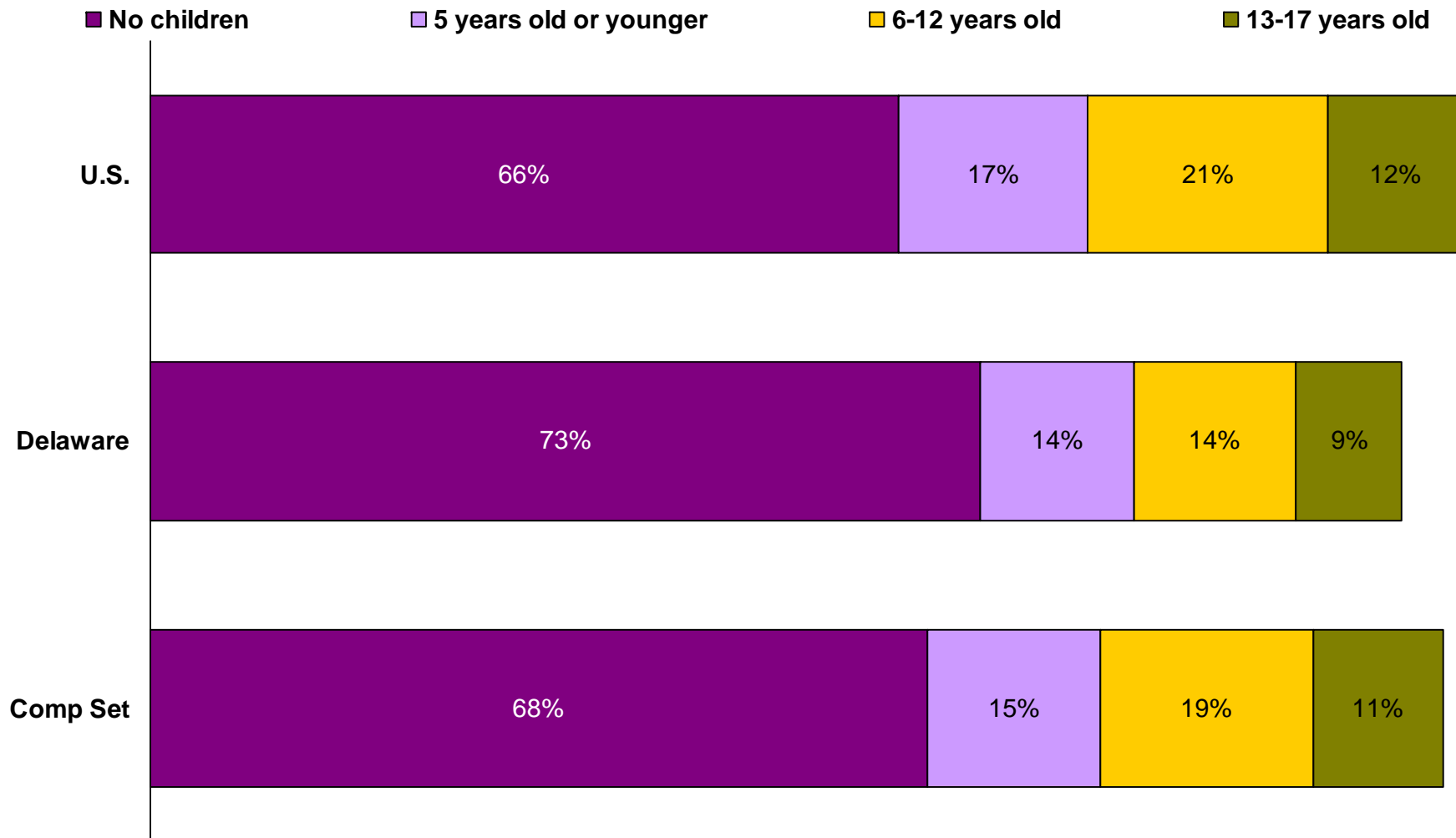


■ Trips Based

■ Trip-Dollars Based



Distribution of Children in Household: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



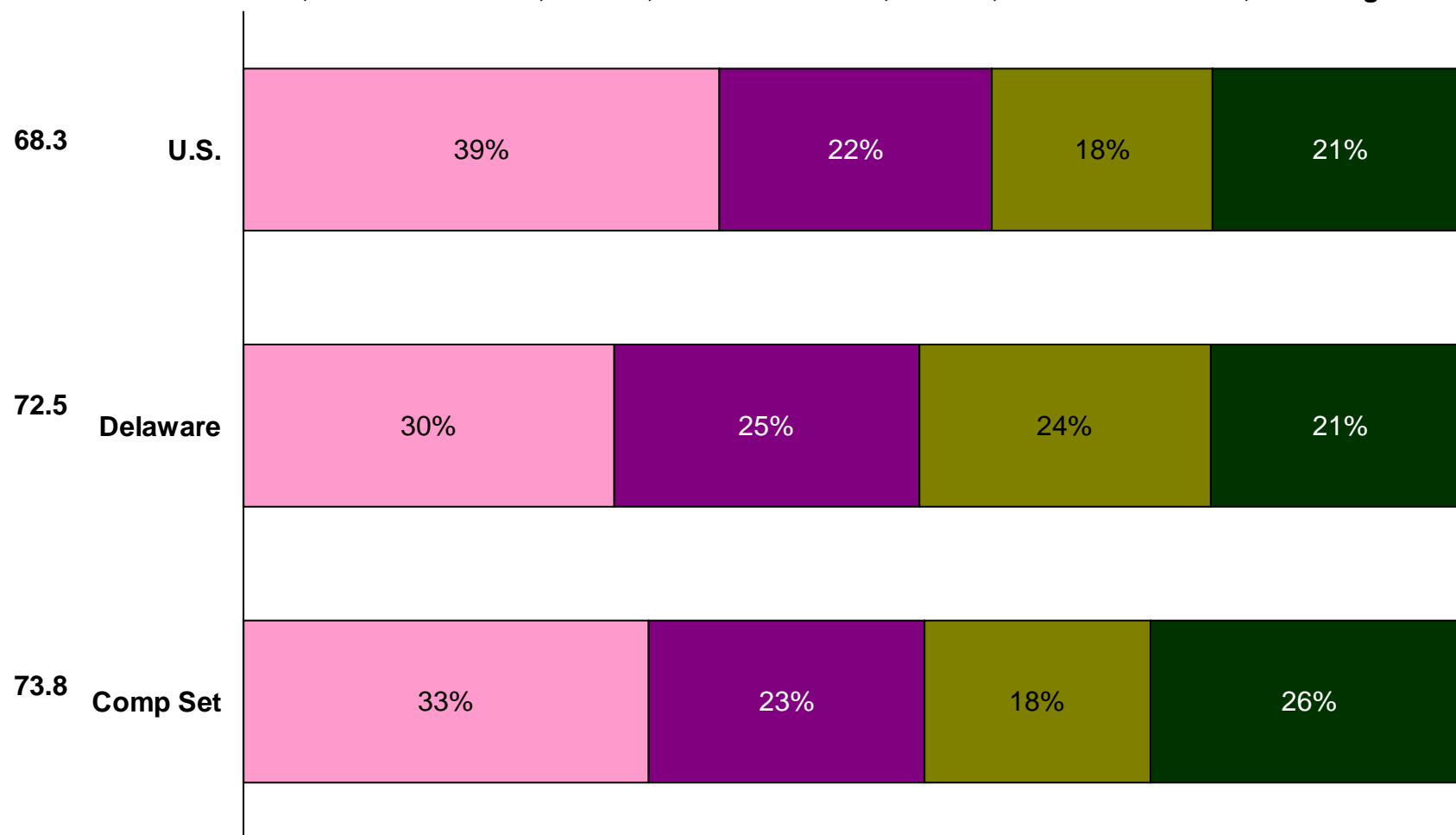


Household Income Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Average
(\$000)

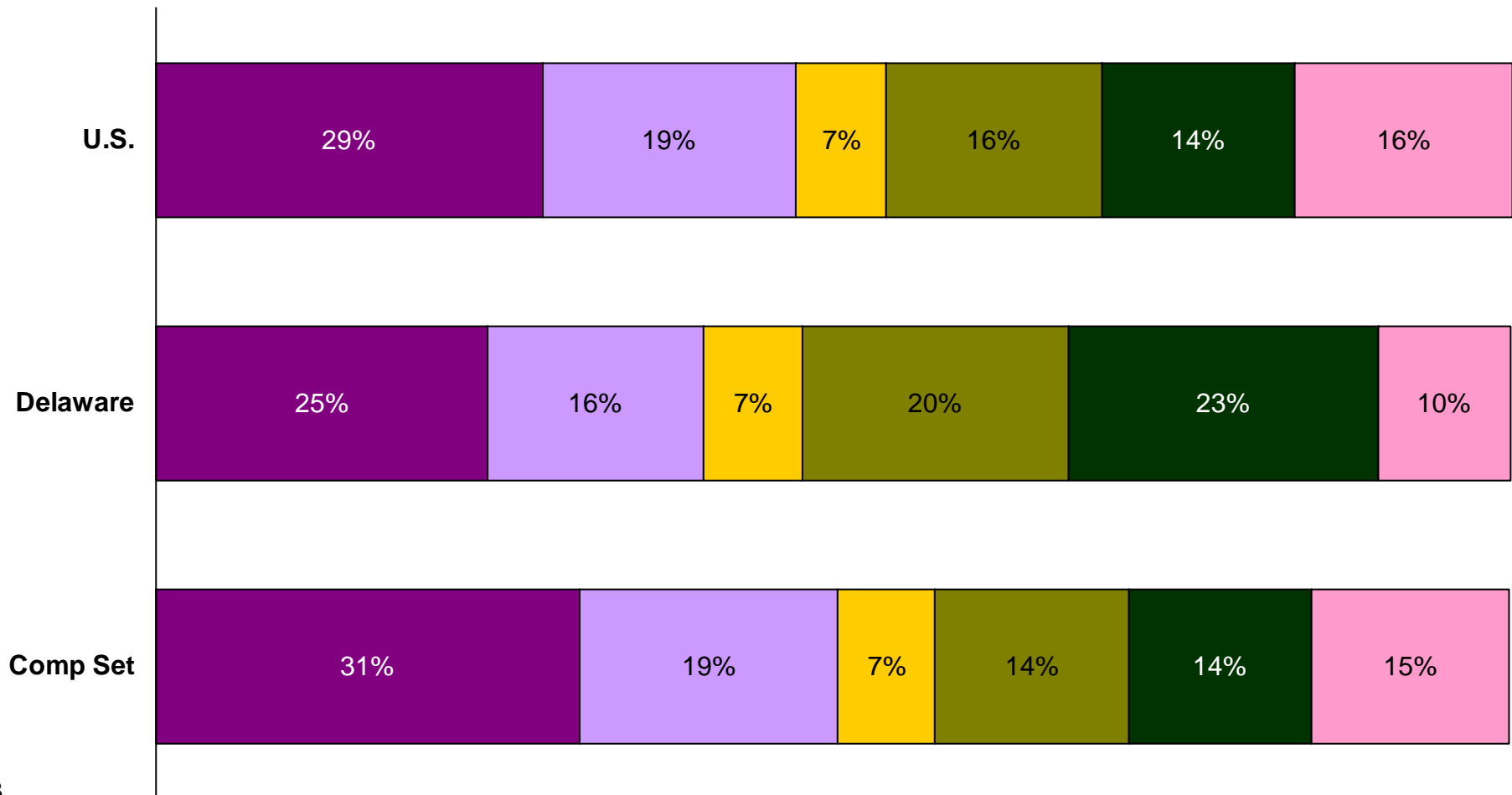
Under \$50,000 \$50,000-\$74,999 \$75,000-\$99,999 \$100,000 or higher



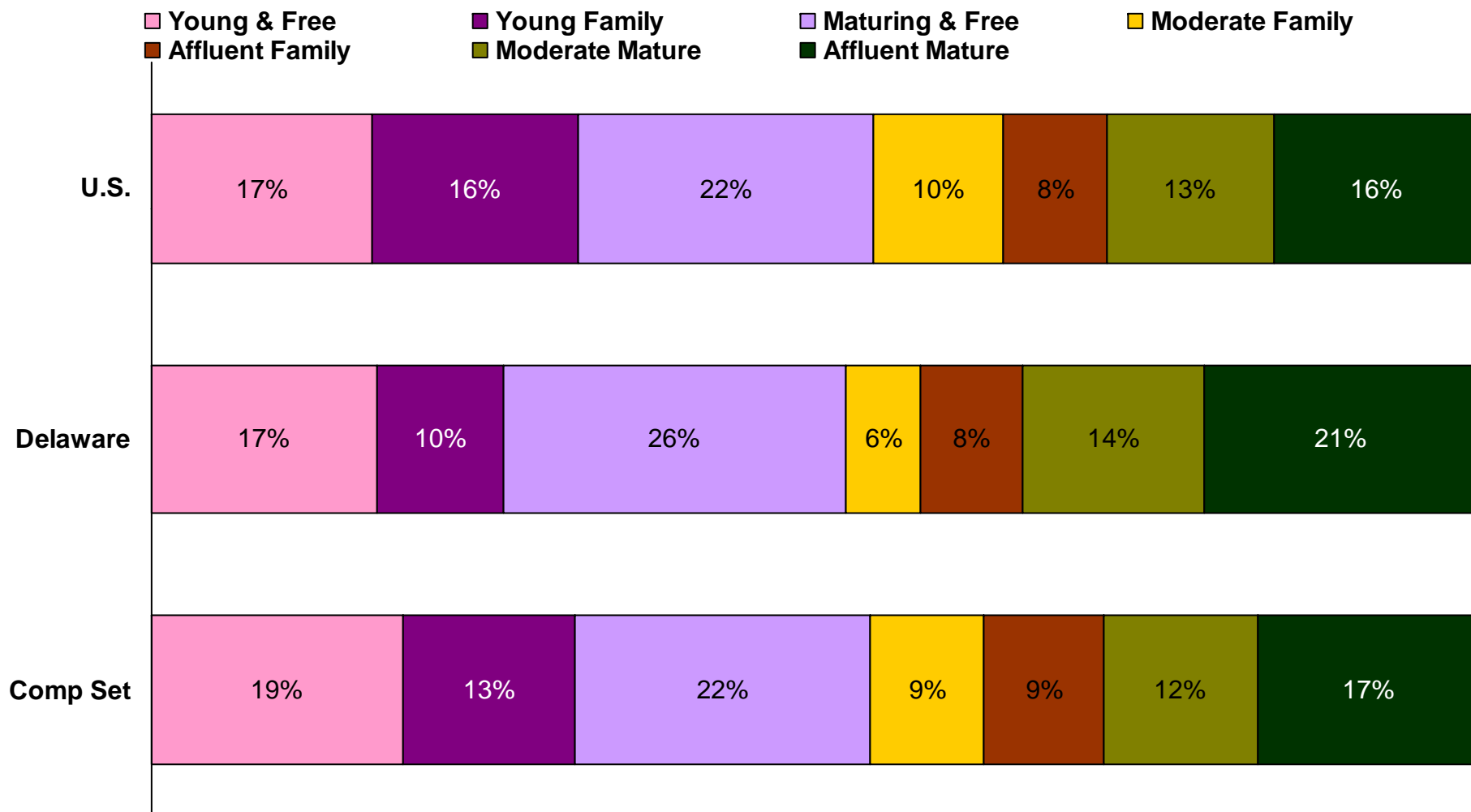
Traveler Occupation: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



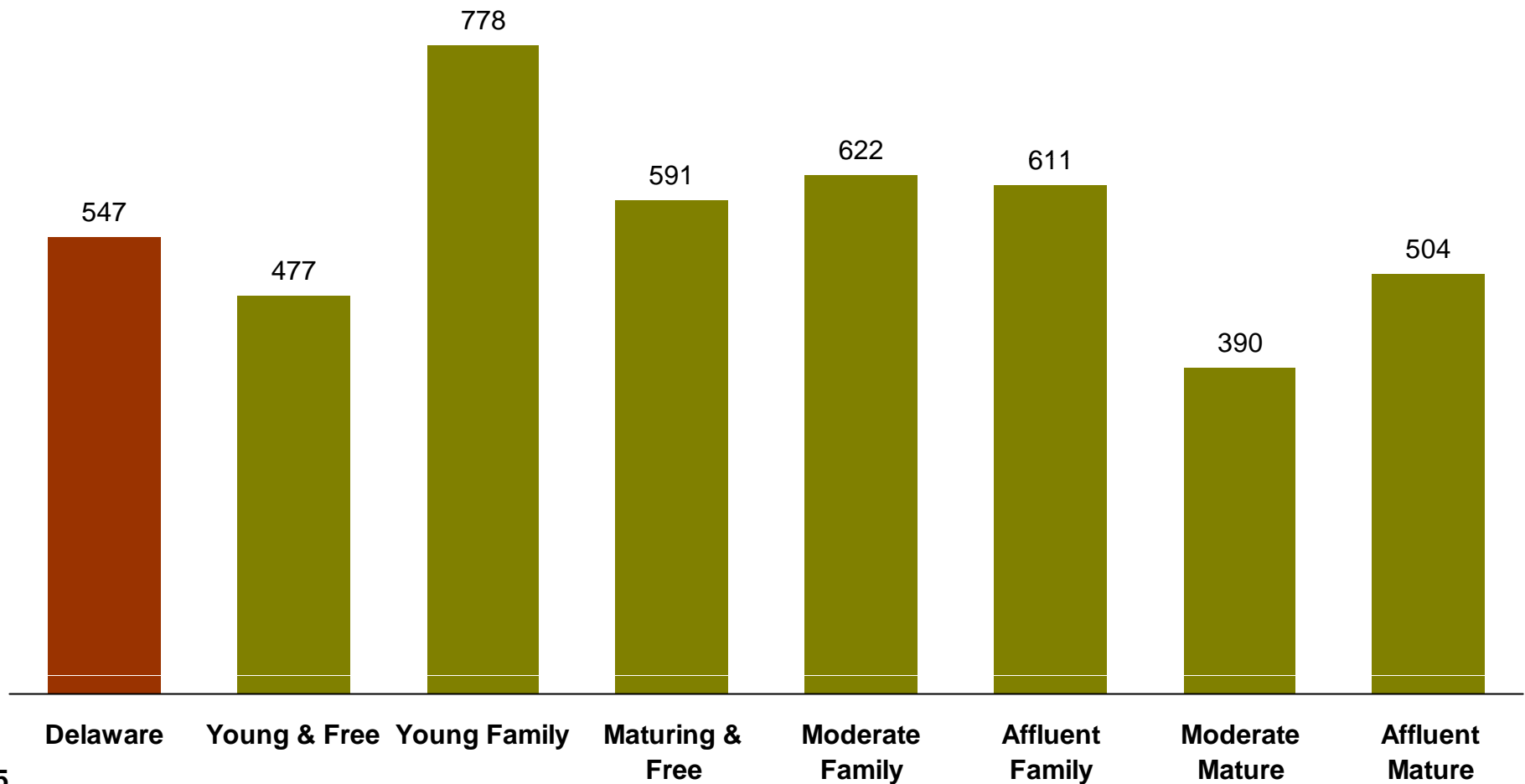
■ Managerial/ Professional ■ Technical/ Sales/Admin ■ Service ■ Other Occupation ■ Retired ■ Not Employed



Lifestage Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Delaware Avg. Party per Trip Spending by Lifestage (\$ Leisure Trips in 2007)

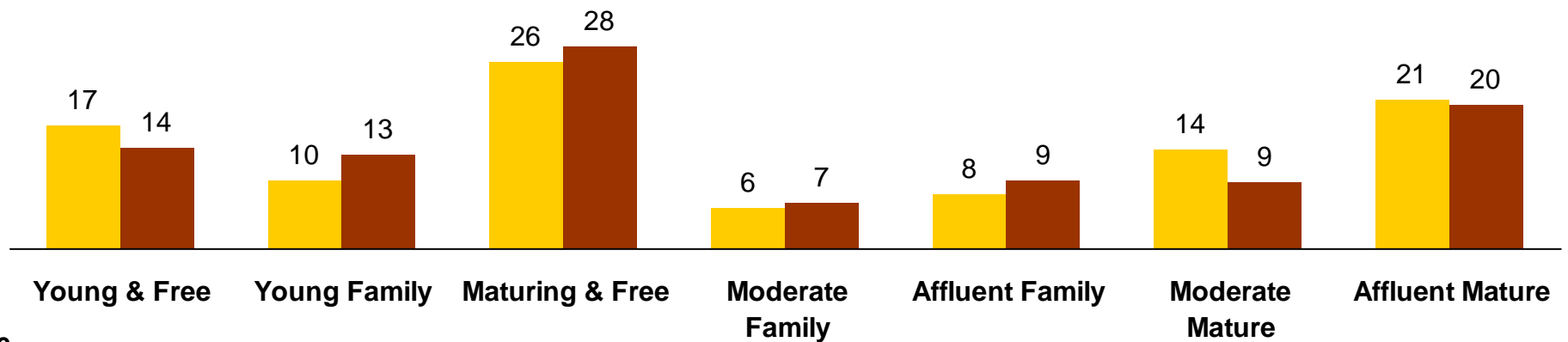


Delaware Lifestage Distribution (% of Leisure in 2007)



■ Trips Based

■ Trip-Dollars Based

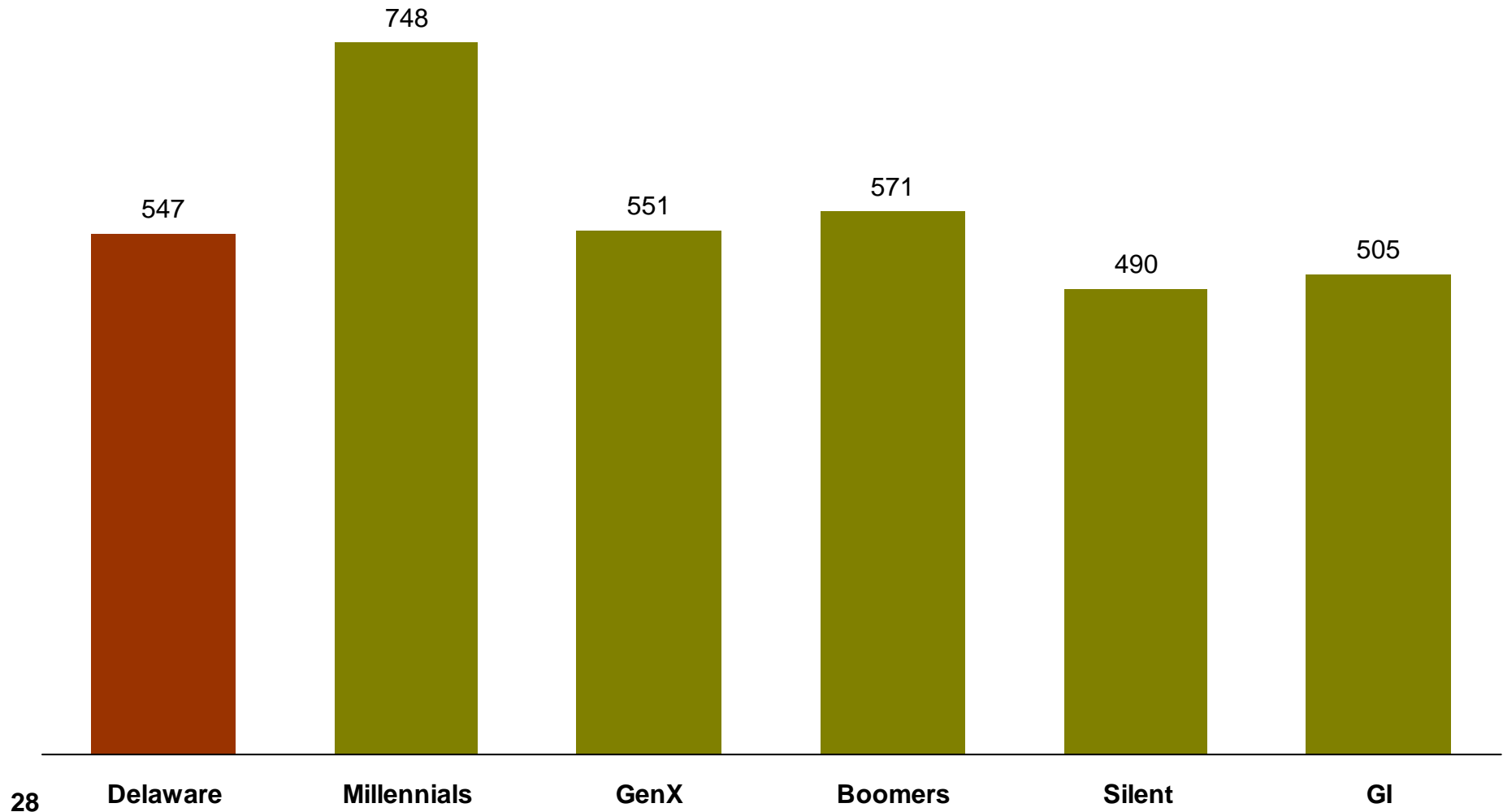


Traveler Generation Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)





Delaware Avg. Party per Trip Spending by Generation (\$ Leisure Trips in 2007)

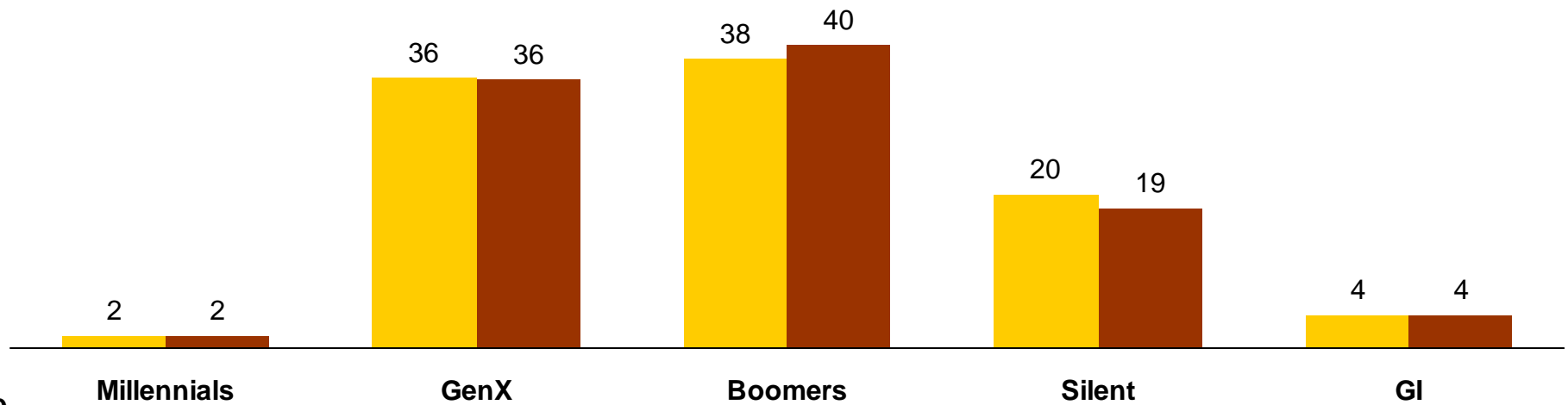


Delaware Traveler Generation Comparison (% of Leisure in 2007)



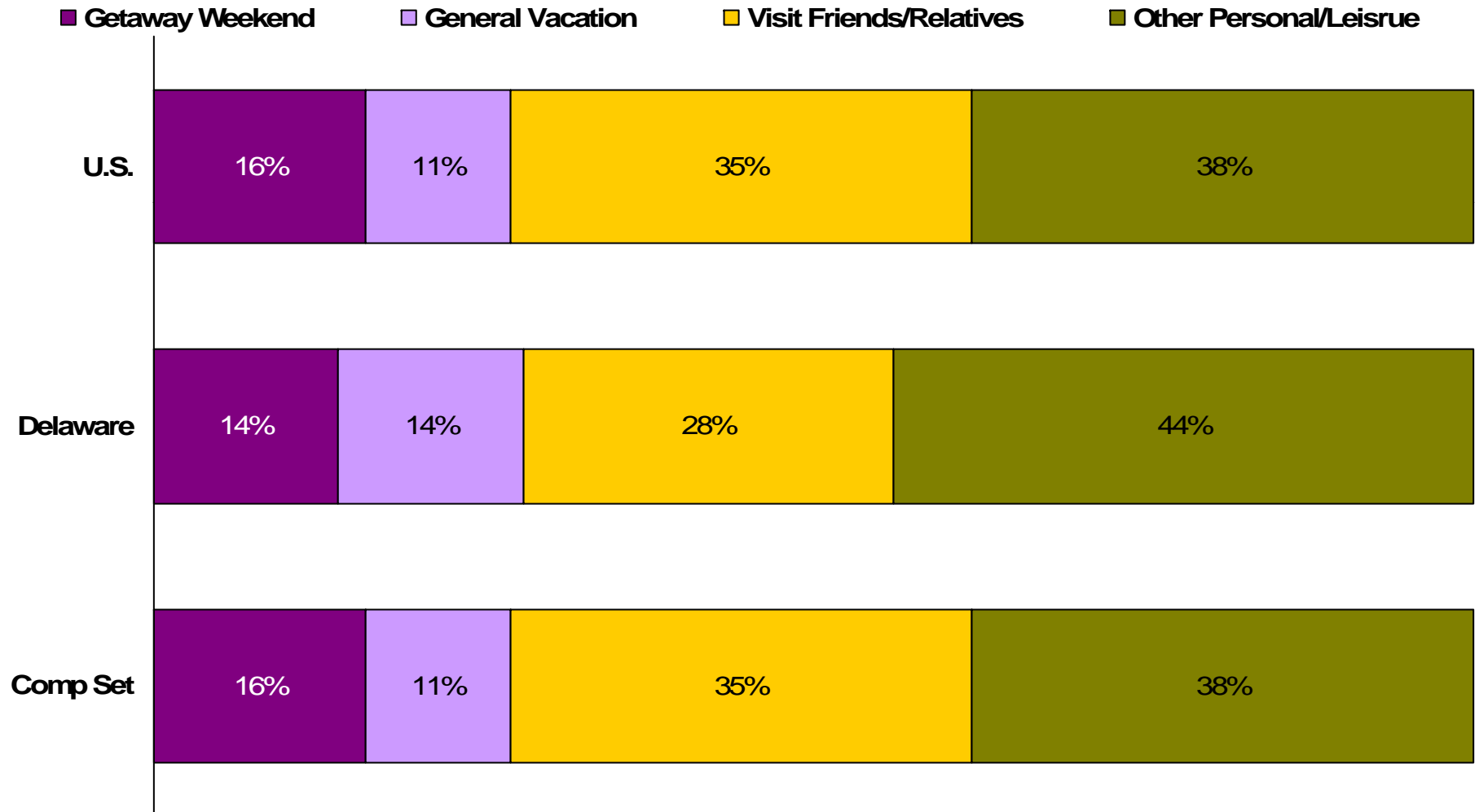
■ Trips Based

■ Trip-Dollars Based



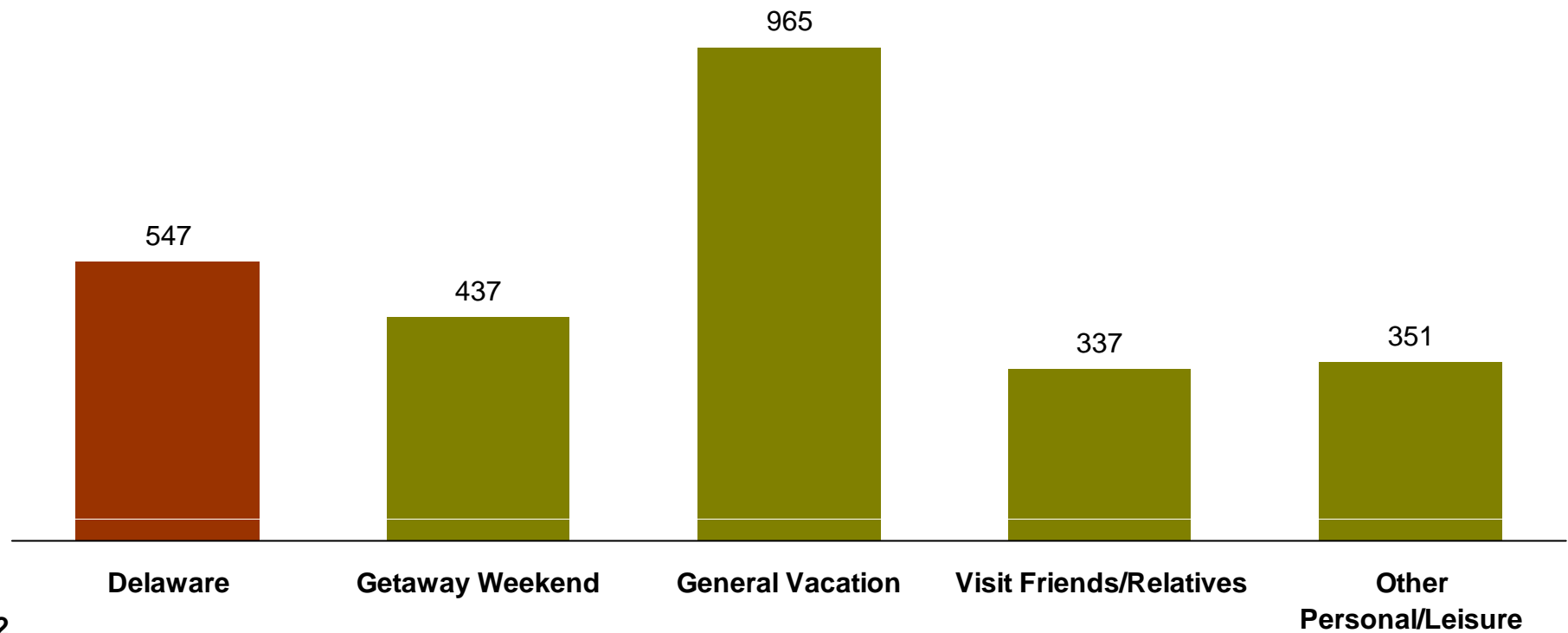


Purpose of Trip Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



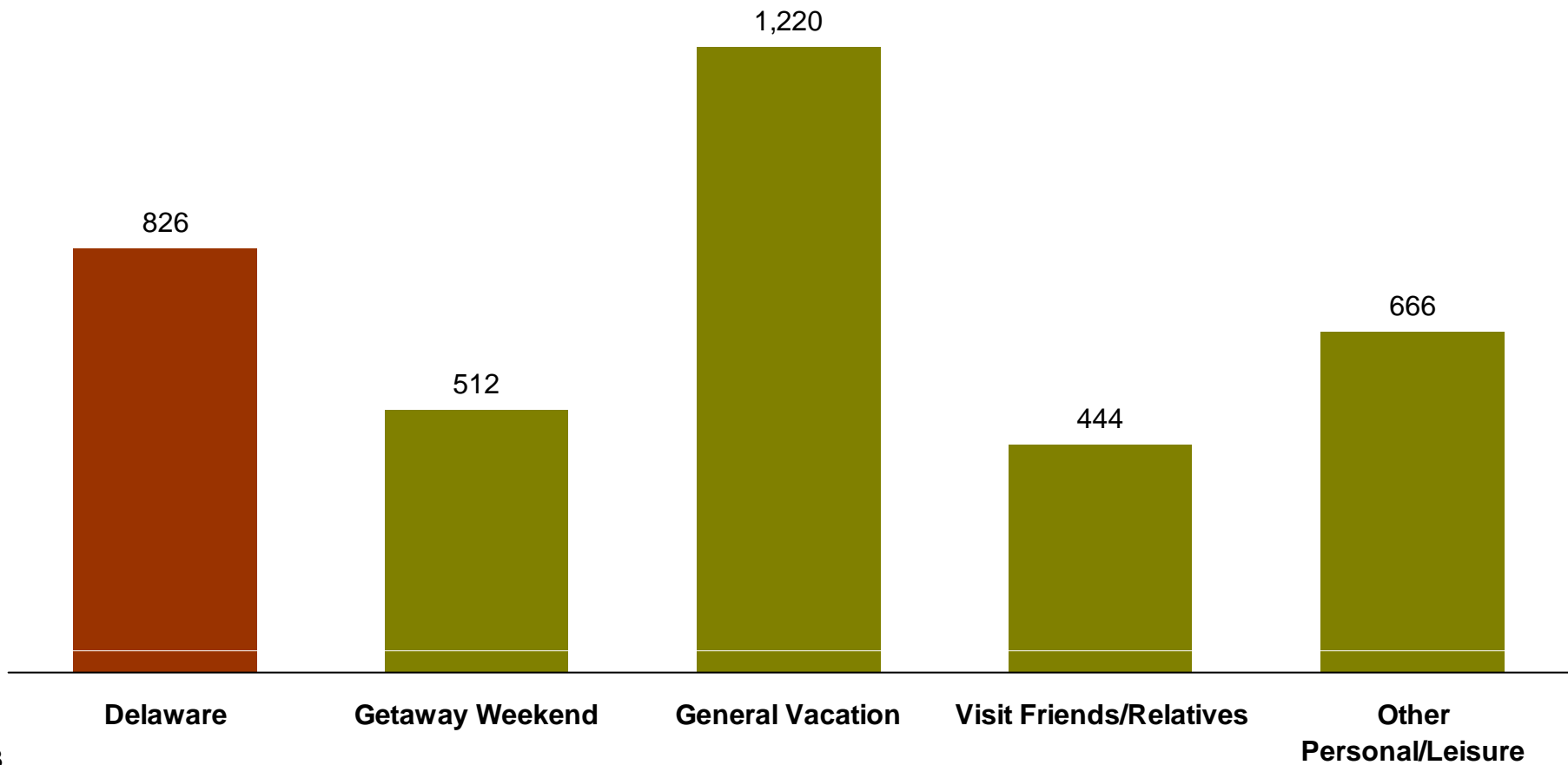


Delaware Avg. Party per Trip Spending by Purpose of Trip (\$ Leisure Trips in 2007)





Delaware Avg. Party per Trip Spending by Purpose of Trip (\$ Overnight Leisure Trips in 2007)

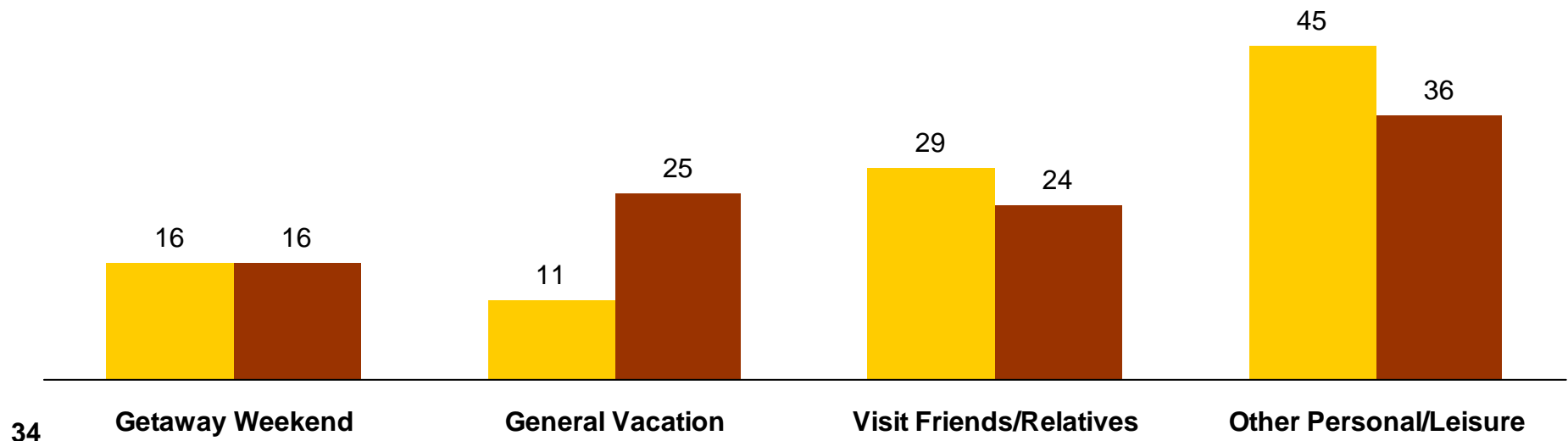


Delaware Purpose of Trip Comparison (% of Leisure in 2007)



■ Trips Based

■ Trip-Dollars Based

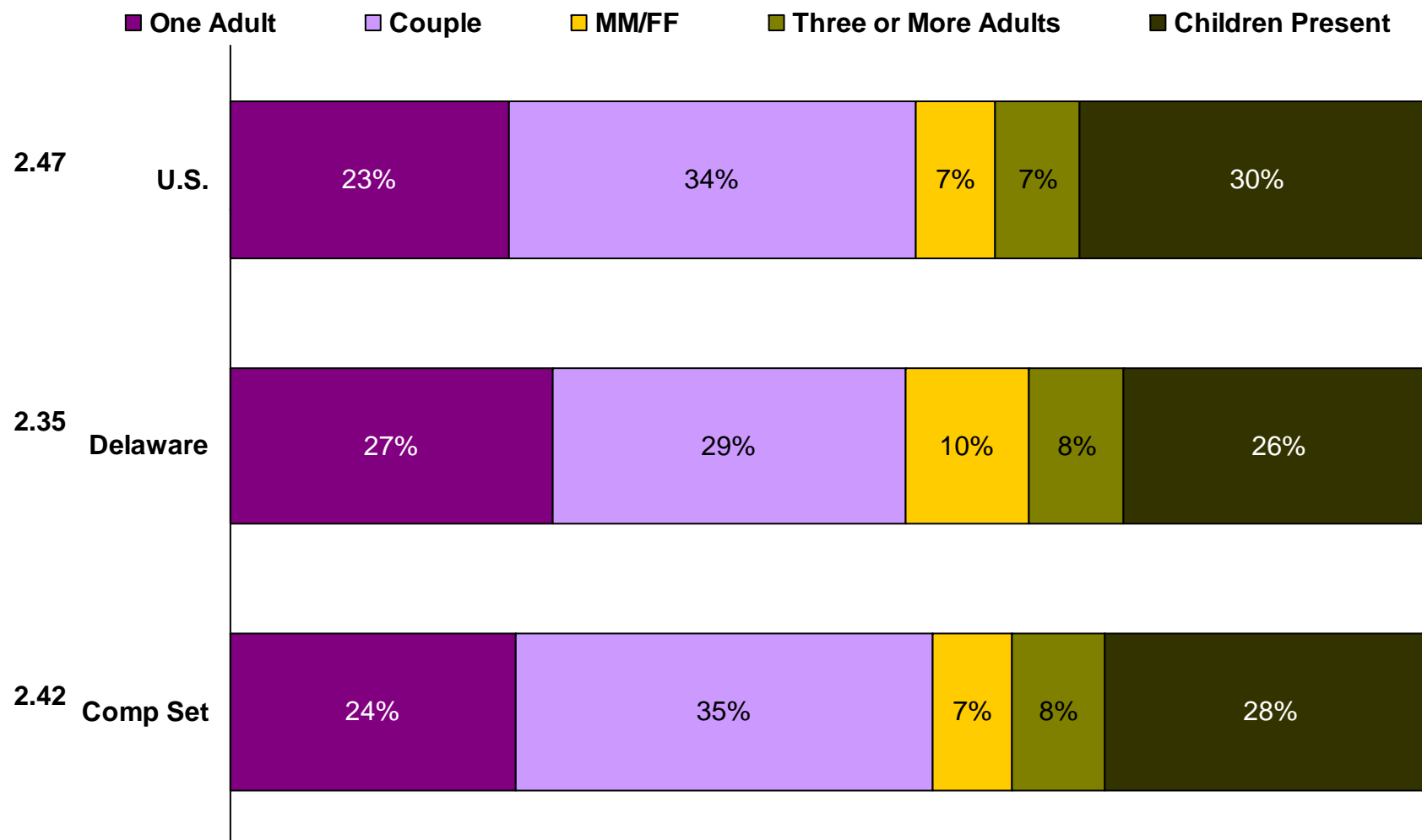




Travel Party Composition Distribution: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Average
Party Size

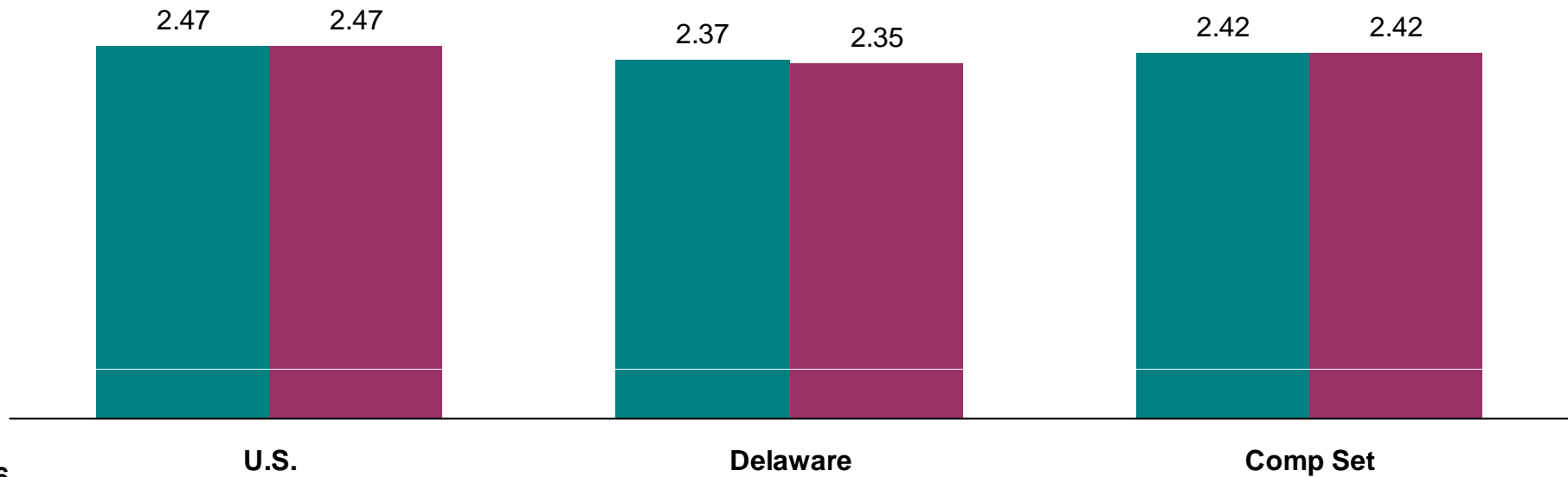


Average Travel Party Size Overview: U.S., Delaware and Competitive Set (Leisure Trips)



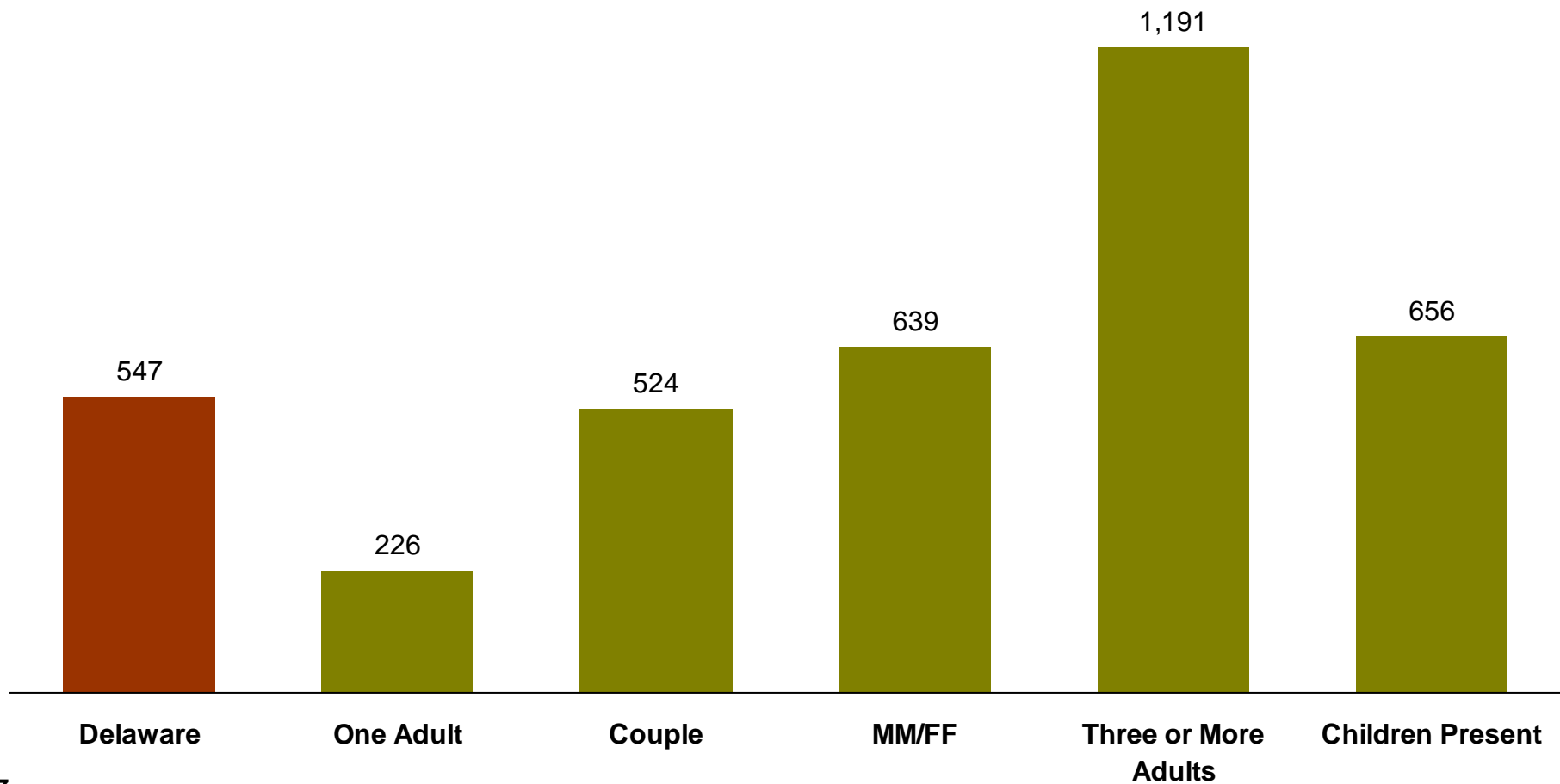
■ 2006

■ 2007





Delaware Avg. Travel Party per Trip Spending by Traveling Party (\$ Leisure Trips in 2007)



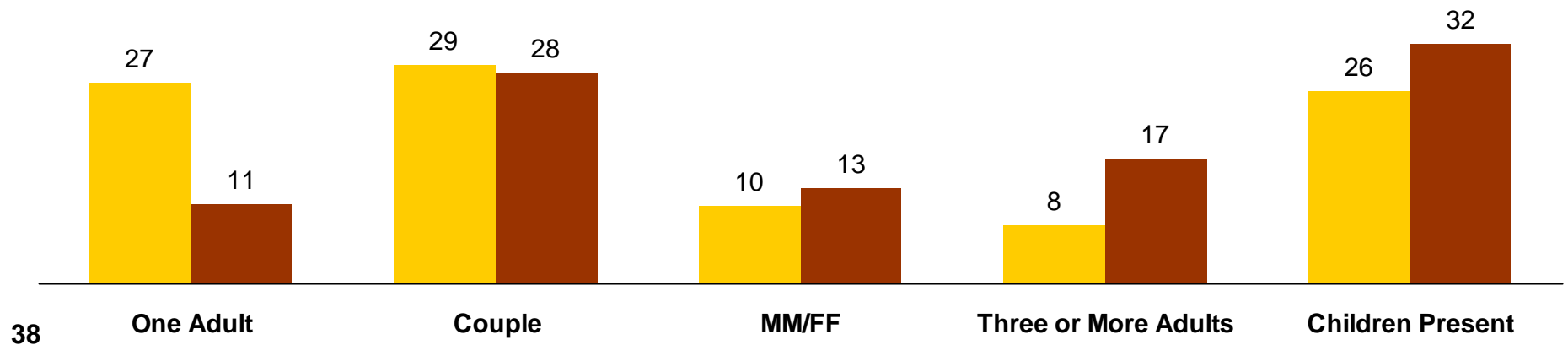


Delaware Travel Party Composition Comparison (% of Leisure in 2007)



■ Trips Based

■ Trip-Dollars Based

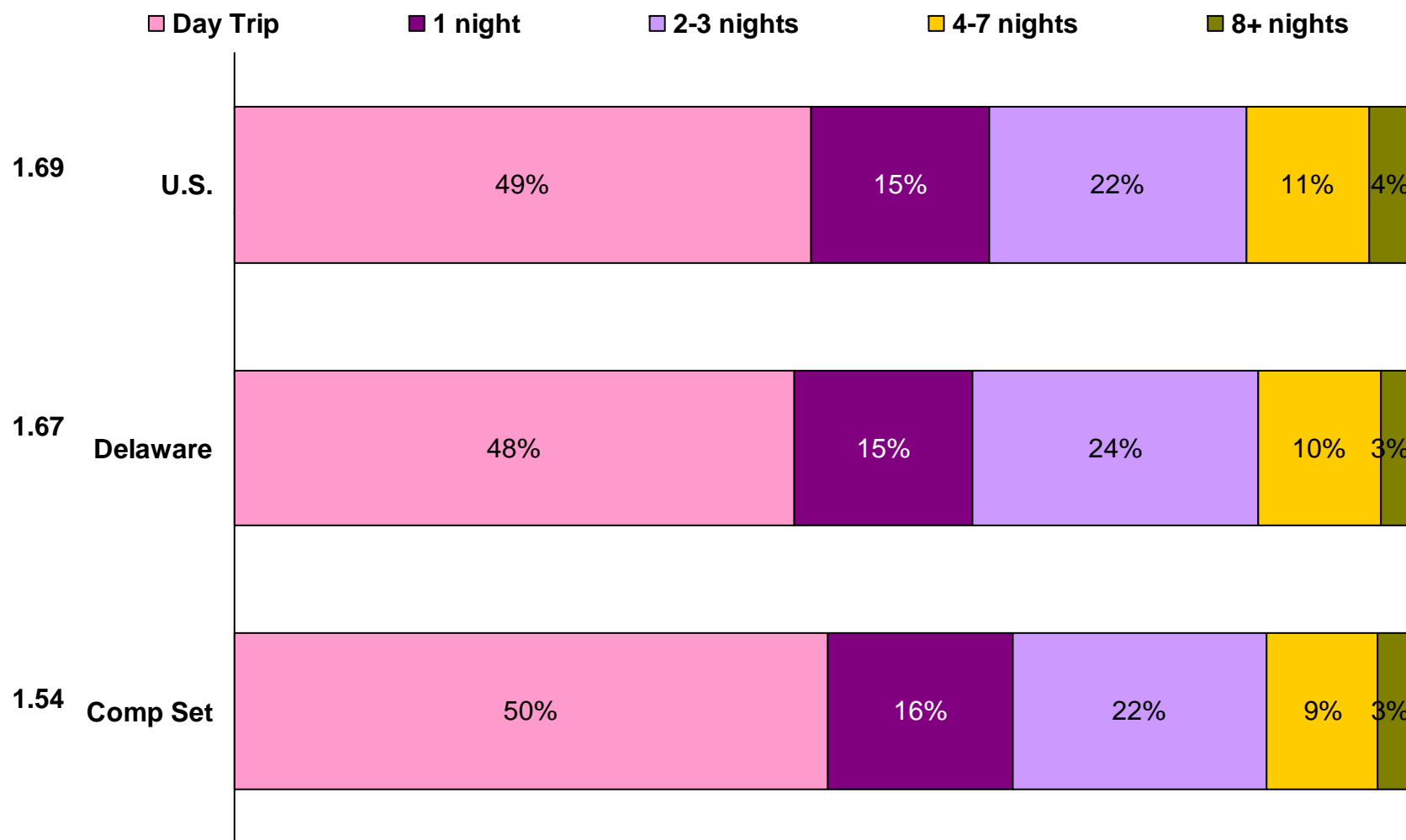




Trip Length Distribution: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)



Average
(Nights)



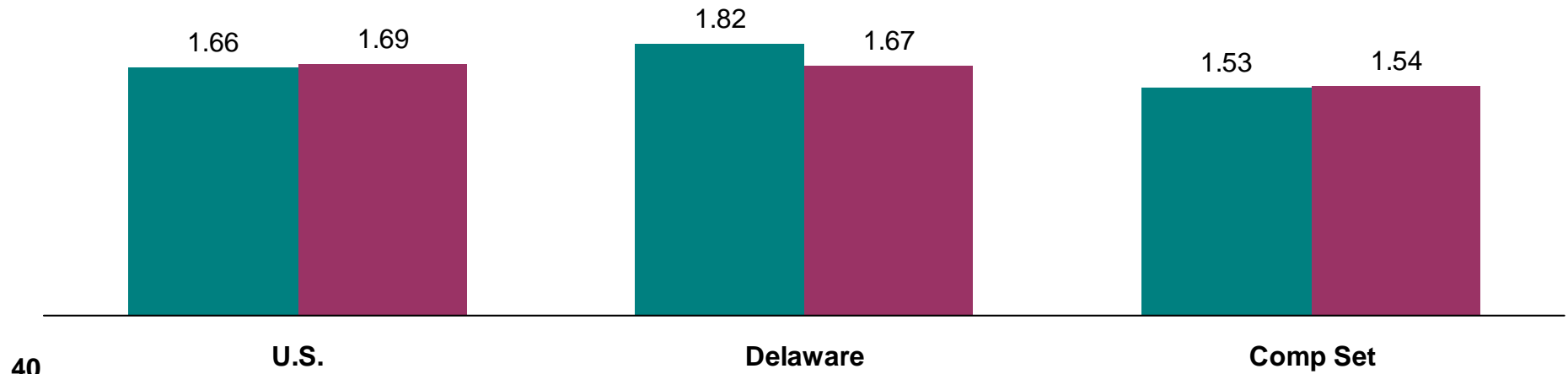


Average Trip Length: U.S., Delaware and Competitive Set (Leisure Person-Trips, incl. Day Trips)



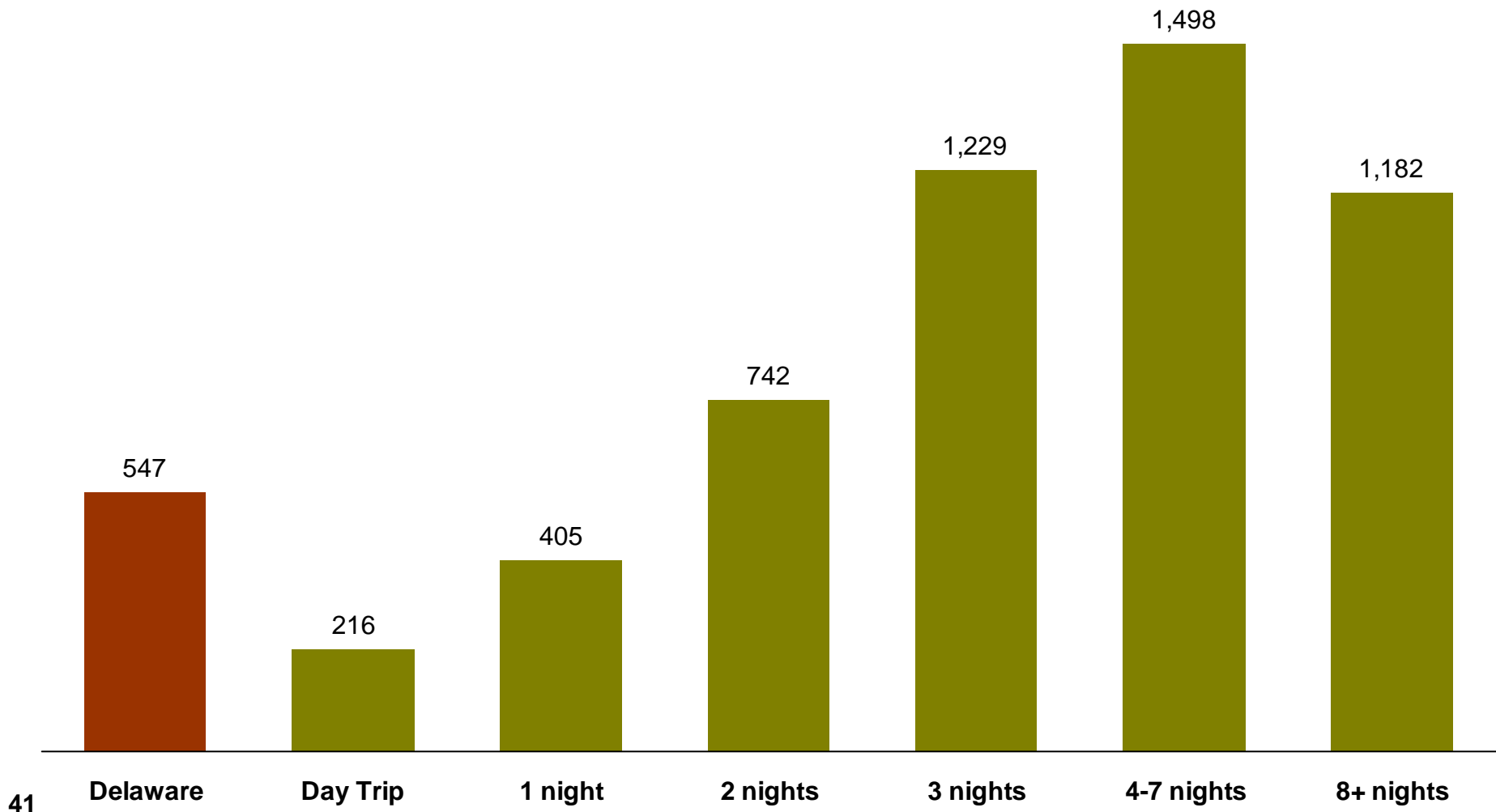
■ 2006

■ 2007





Delaware Avg. Party per Trip Spending by Trip Length (*\$ Leisure Trips in 2007*)



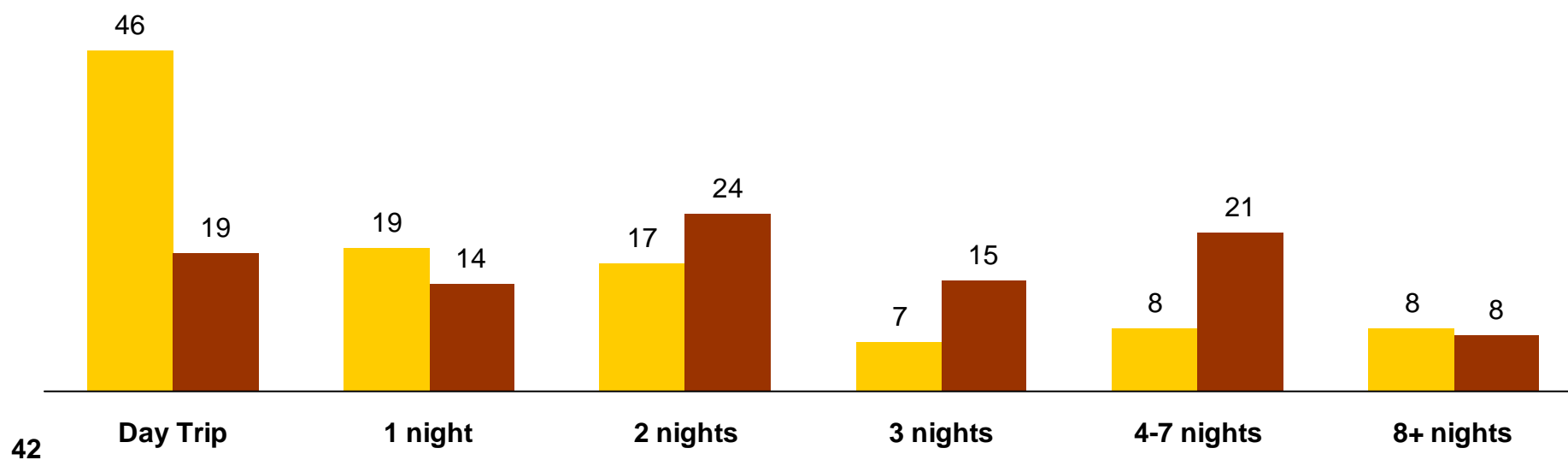


Delaware Trip Length Comparison (% of Leisure in 2007)



■ Trips Based

■ Trip-Dollars Based

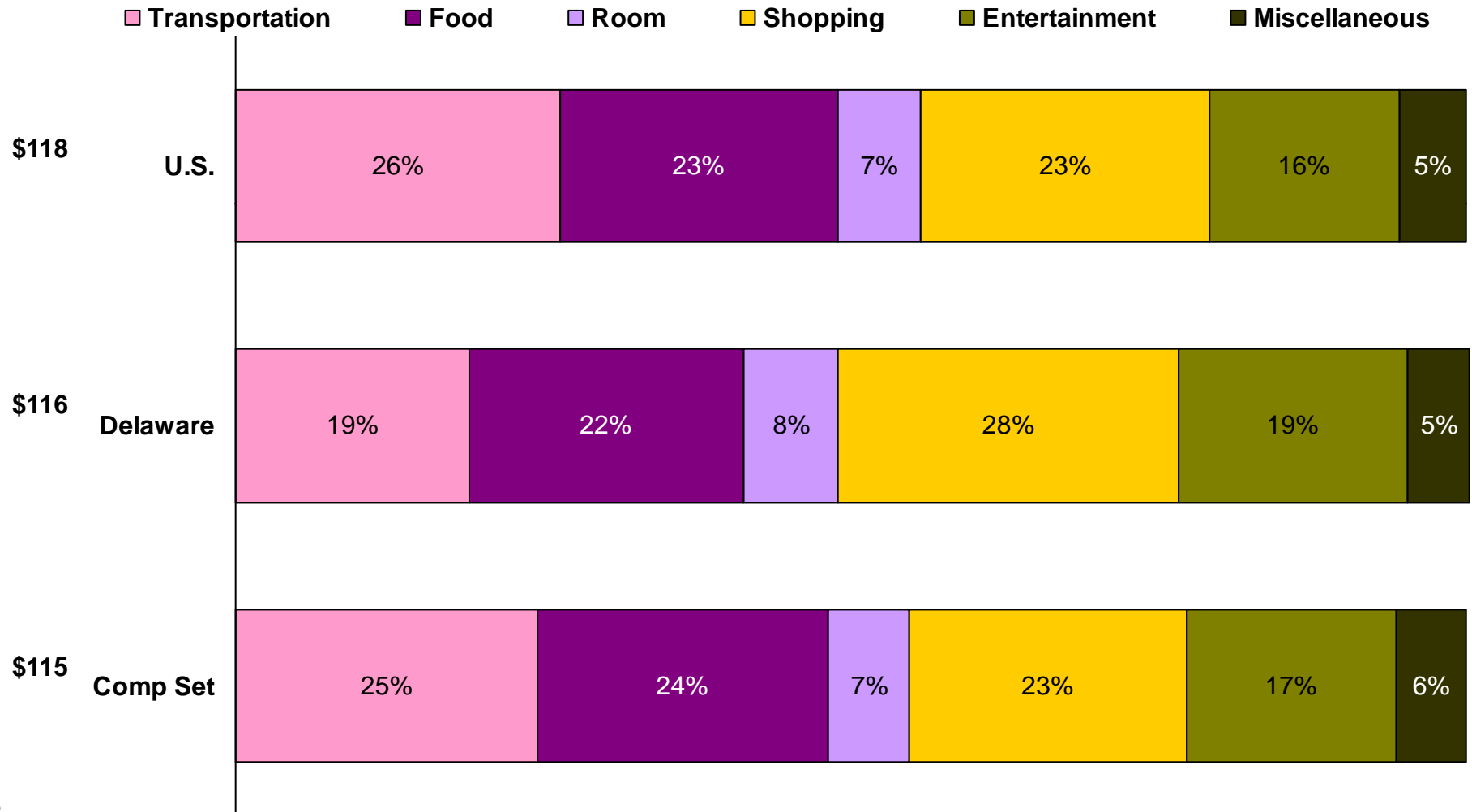




Daily Spending Per Person by Spending Category: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Average

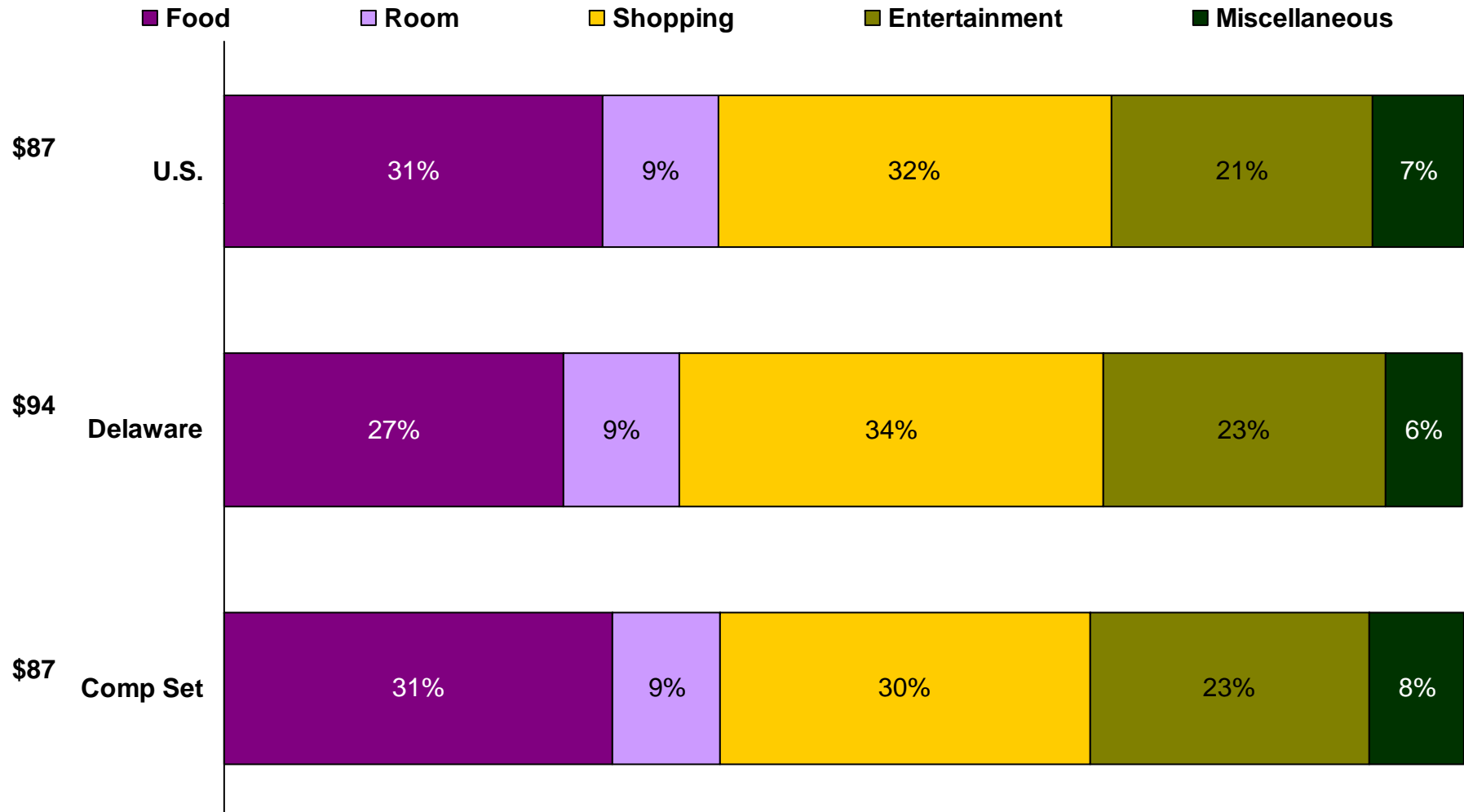




Daily Spending Per Person by Spending Category: U.S., Delaware and Competitive Set (% of Leisure Trips in 2007)



Average



Top Activities at the Destination (% of Leisure Trips in 2007)



The following two charts show activities in which visitors participated at the destination on the trip. Data are sorted in descending order by Delaware visitors. Participation rates well above the U.S. averages are highlighted.

	U.S.	Delaware	Comp Set
Dining	33%	36%	34%
Shopping	28%	30%	26%
Entertainment	24%	27%	24%
Gamble	8%	20%	9%
Beach, Waterfront	7%	16%	7%
Sightseeing	20%	13%	19%
Watch Sports	5%	7%	5%
National or State Parks	6%	6%	5%
Night Life	8%	5%	9%
Festival, Craft Fair	5%	4%	6%

Top Activities at the Destination (cont.) (% of Leisure Trips in 2007)



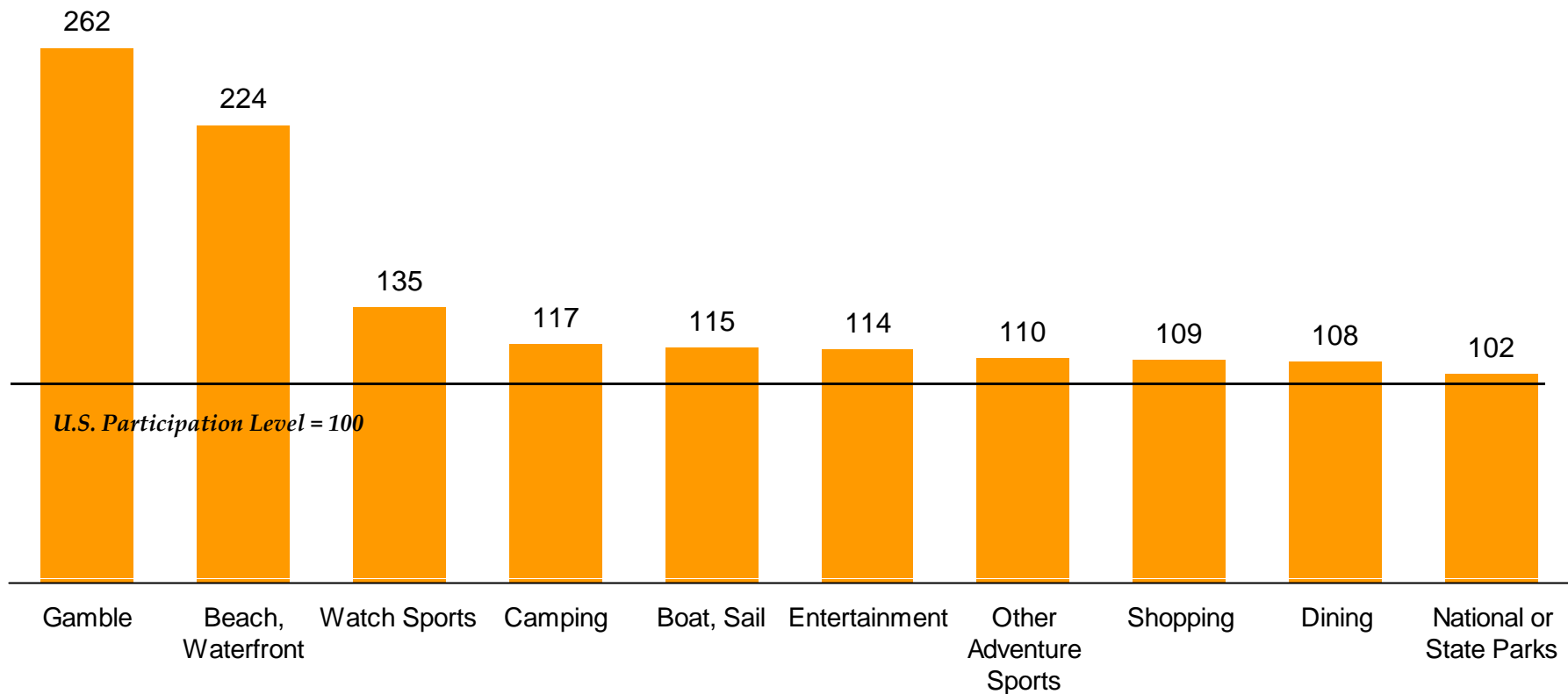
	U.S.	Delaware	Comp Set
Concert, Play, Dance	6%	4%	7%
Hunt, Fish	3%	3%	3%
Theme Park, Amusement Park	6%	3%	6%
Museum, Art Exhibit	5%	3%	5%
Visit Historic Site	5%	3%	6%
Other Adventure Sports	2%	2%	2%
Camping	2%	2%	2%
Boat, Sail	2%	2%	2%
Nature, Eco-Travel	3%	2%	3%
Look at Real Estate	2%	2%	2%
Hike, Bike	4%	2%	3%
Golf	2%	1%	1%
Group Tour	3%	1%	3%
Shows (auto, boat, antique, etc.)	2%	1%	2%

Delaware Activity Index

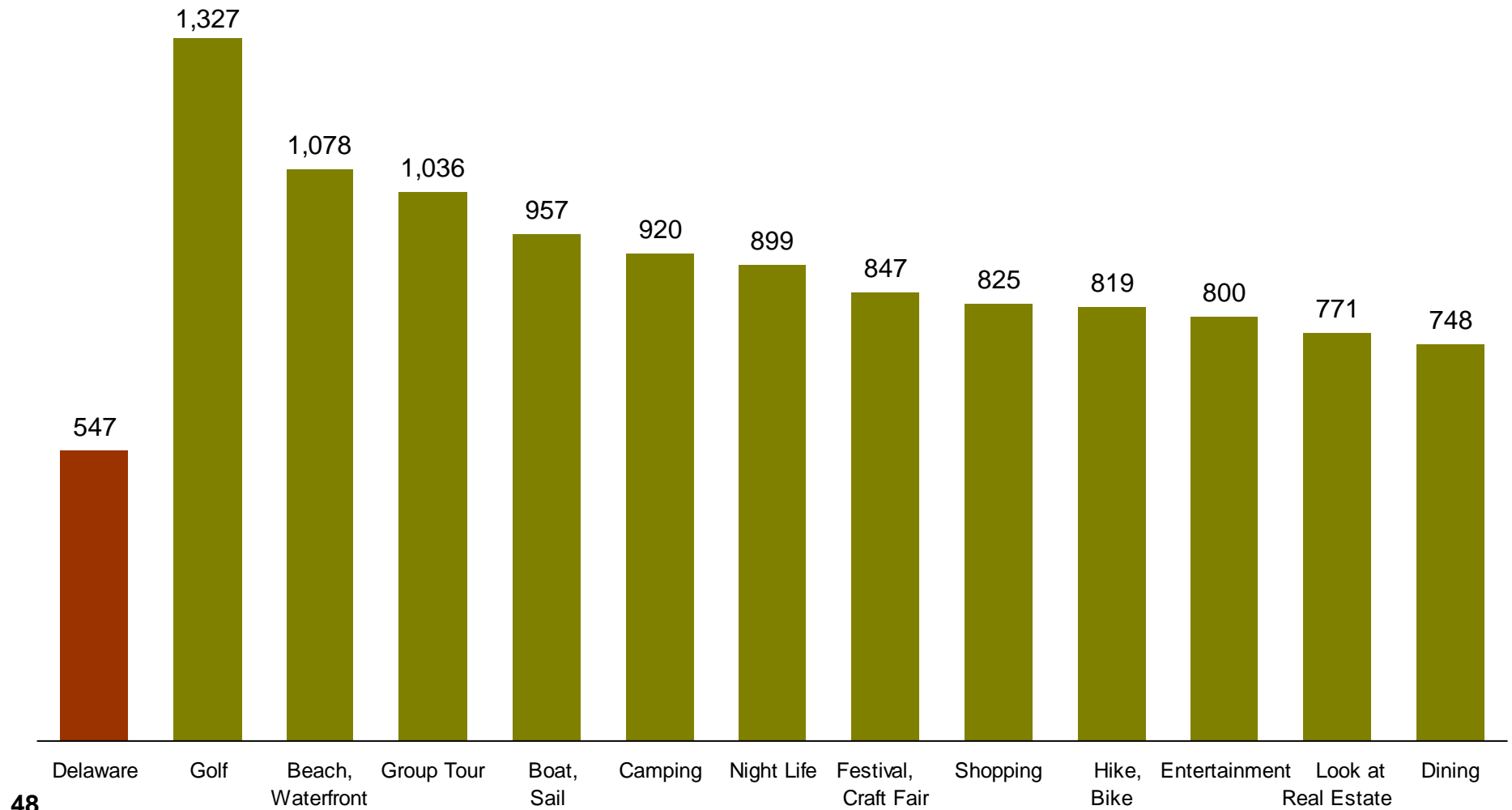
(U.S. Participation Level = 100)
(Leisure Trips in 2007)



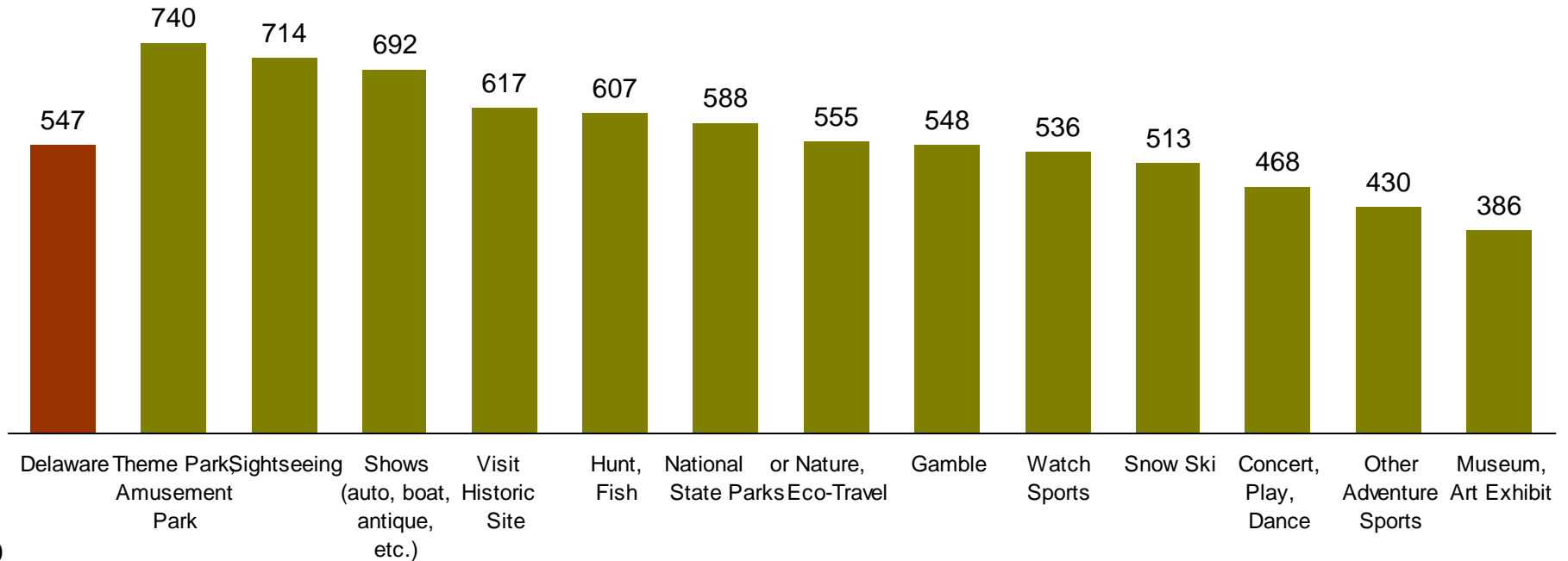
The activity index uses the U.S. to determine the average of 100 and anything above is an activity that travelers in Delaware are more likely to do than visitors to the U.S. The Index is different from the share of participation in that it only reflects a traveler's propensity to participate in an activity, relative to the propensity for average U.S. destinations.



Delaware Avg. Party per Trip Spending by Activities (\$ Leisure Trips in 2007)



Delaware Avg. Party per Trip Spending by Activities (cont.) (\$ Leisure Trips in 2007)

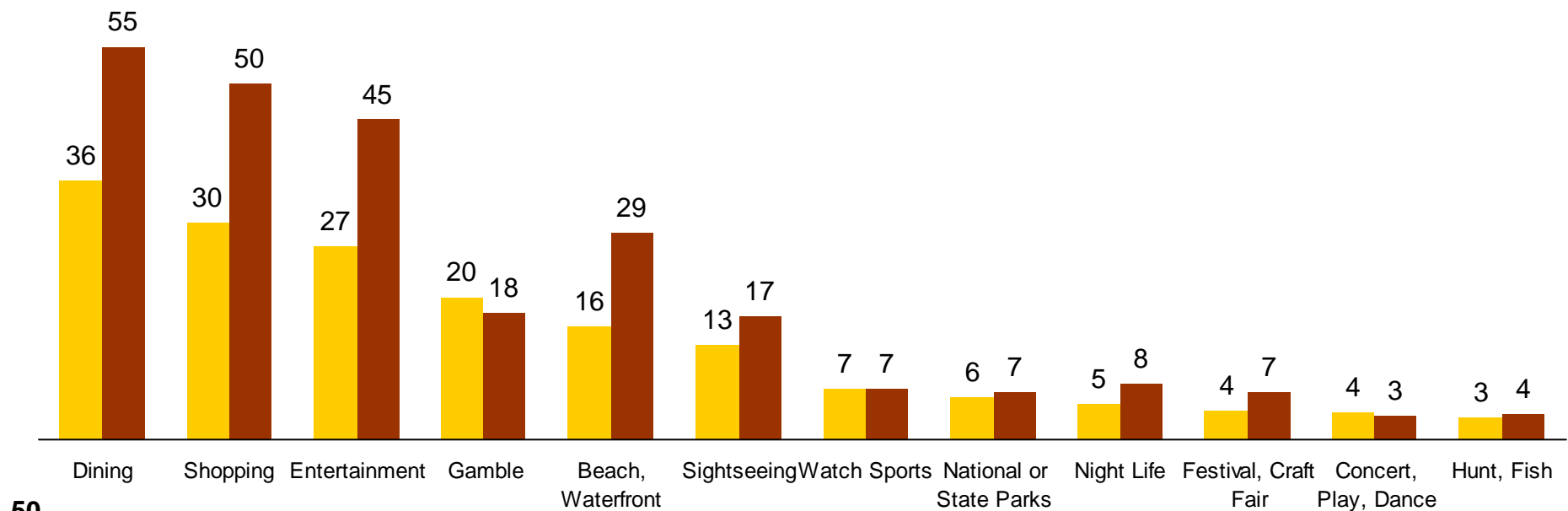


Delaware Activity Comparison (% of Leisure in 2007)



■ Trips Based

■ Trip-Dollars Based

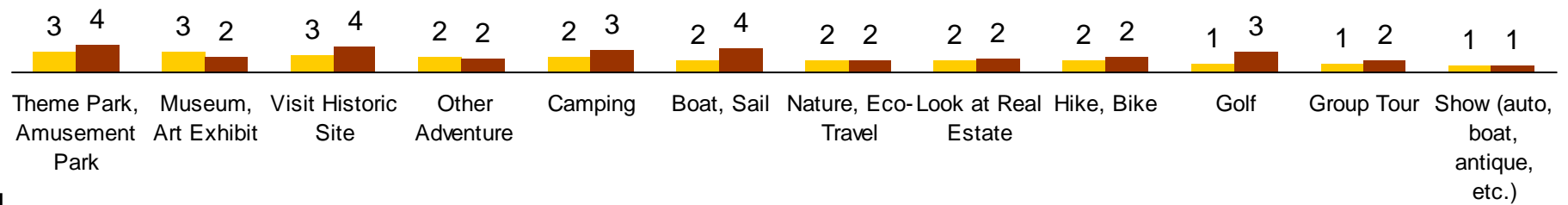


Delaware Activity Comparison (cont.) (% of Leisure in 2007)

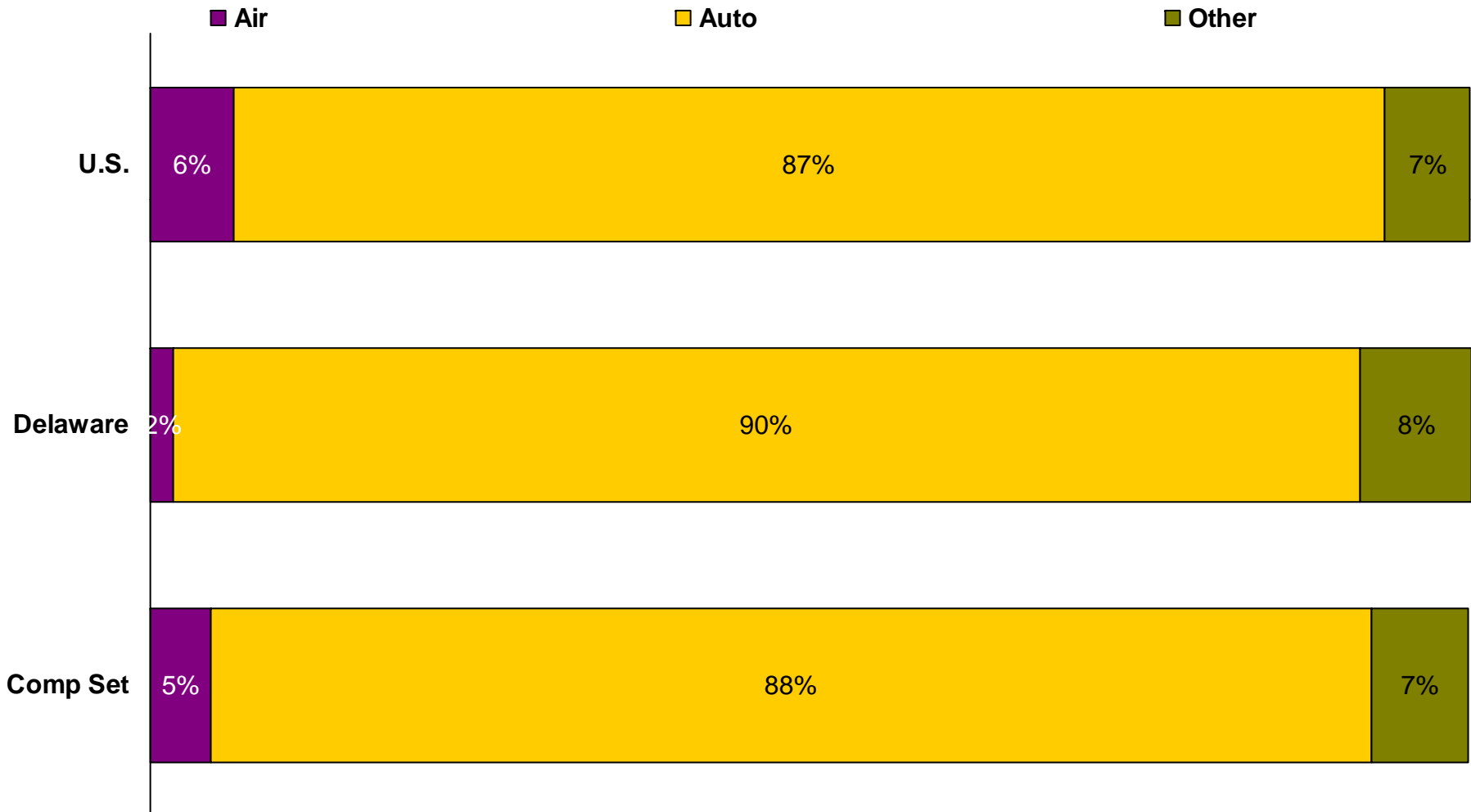


■ Trips Based

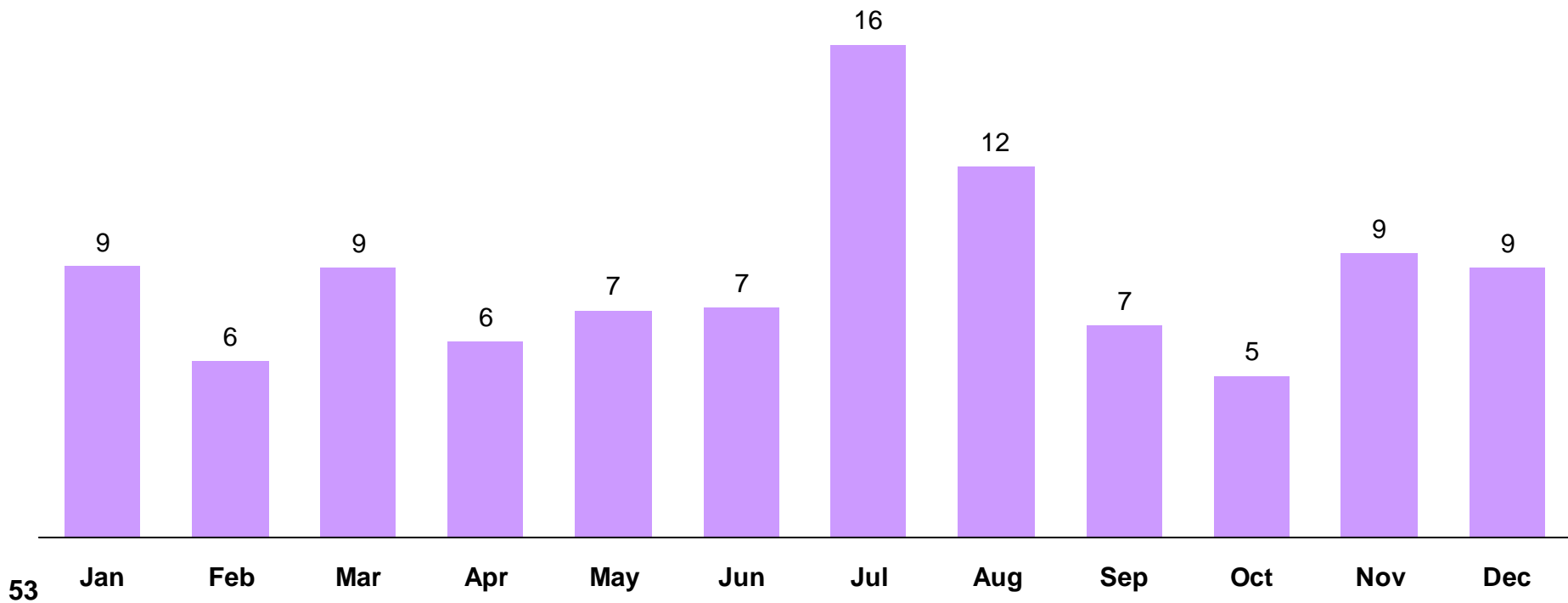
■ Trip-Dollars Based



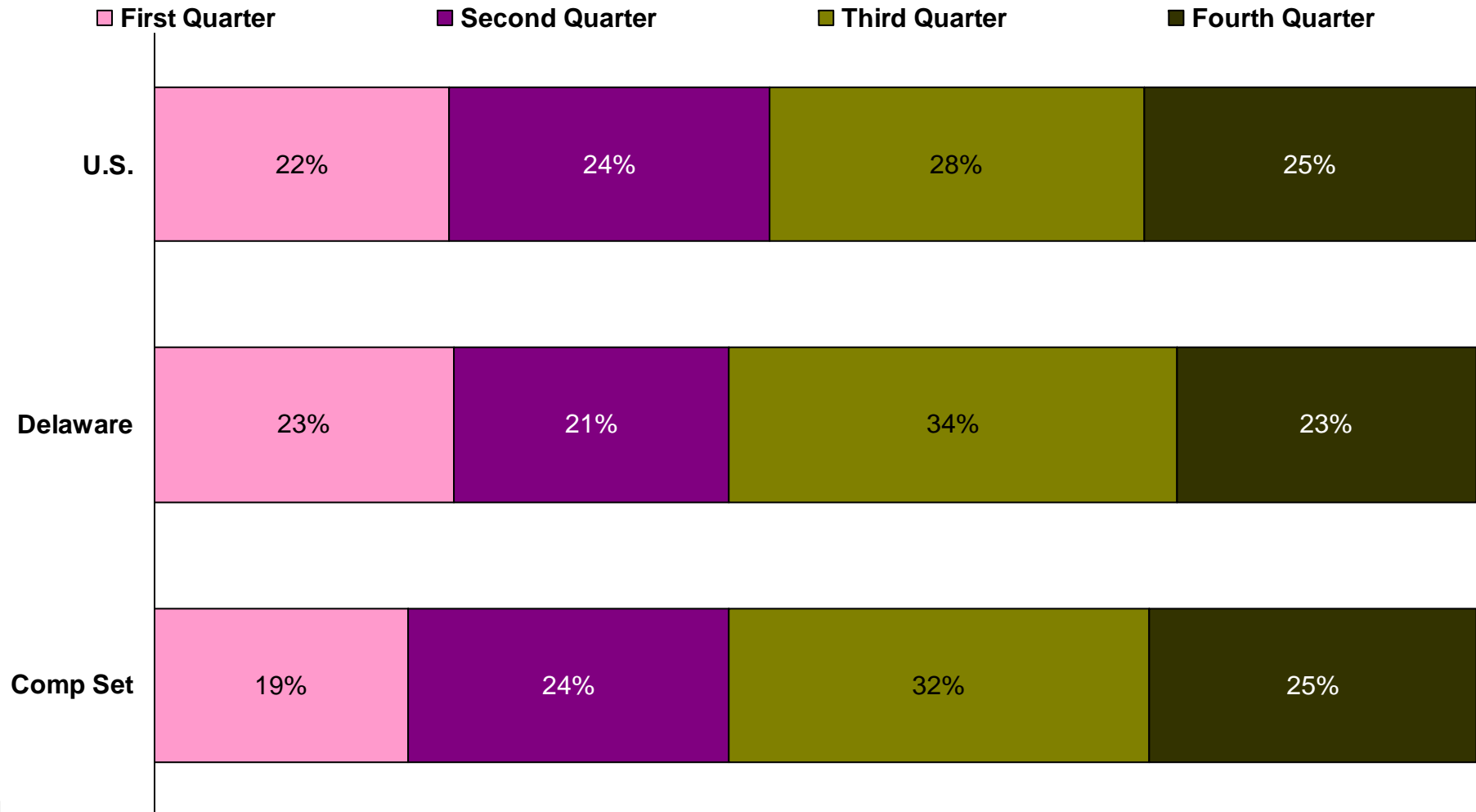
Main Mode of Transportation: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)



Delaware Month Trip Started (% of Leisure Person-Trips in 2007)

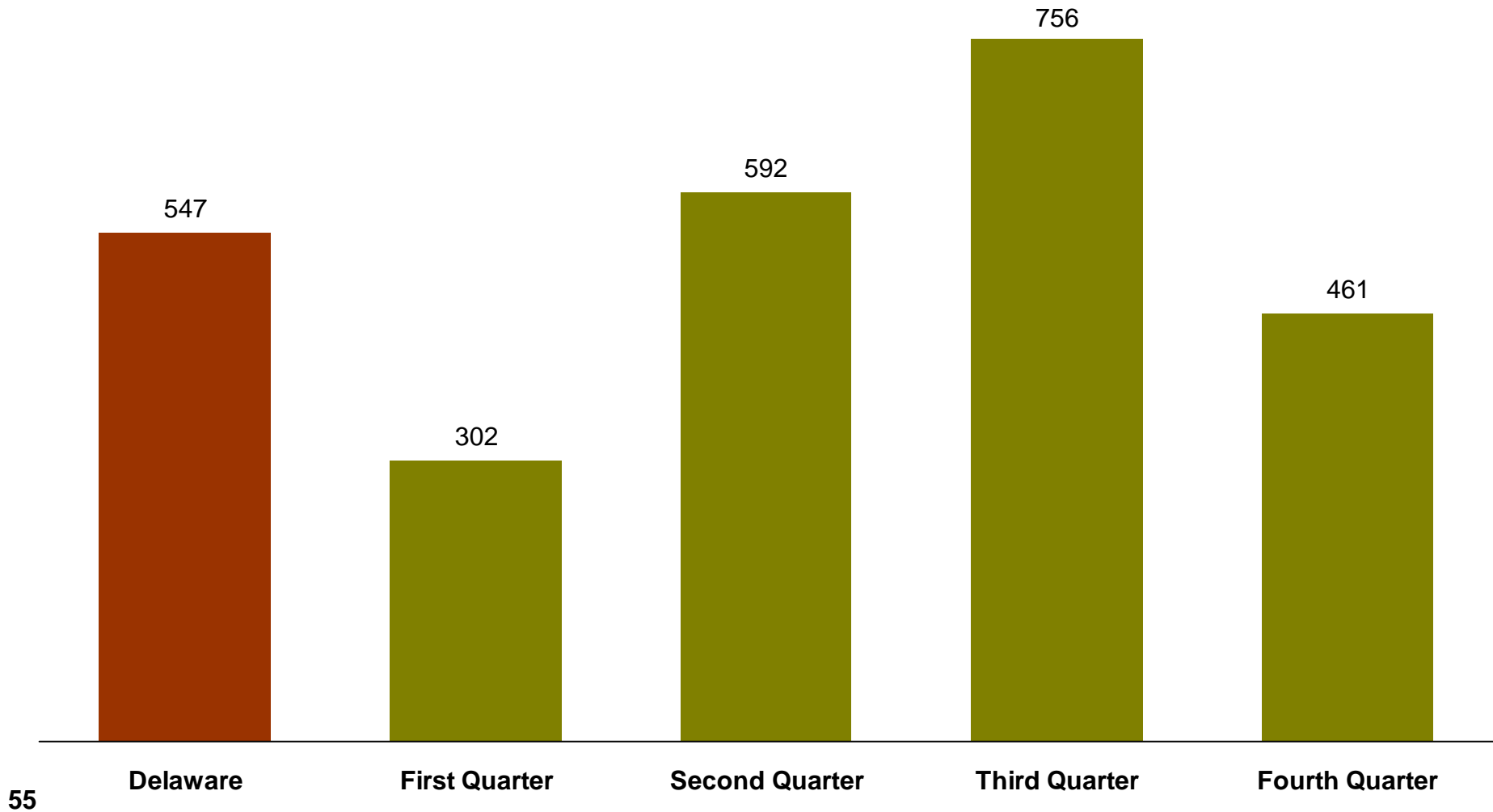


Trip Timing by Quarter: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)





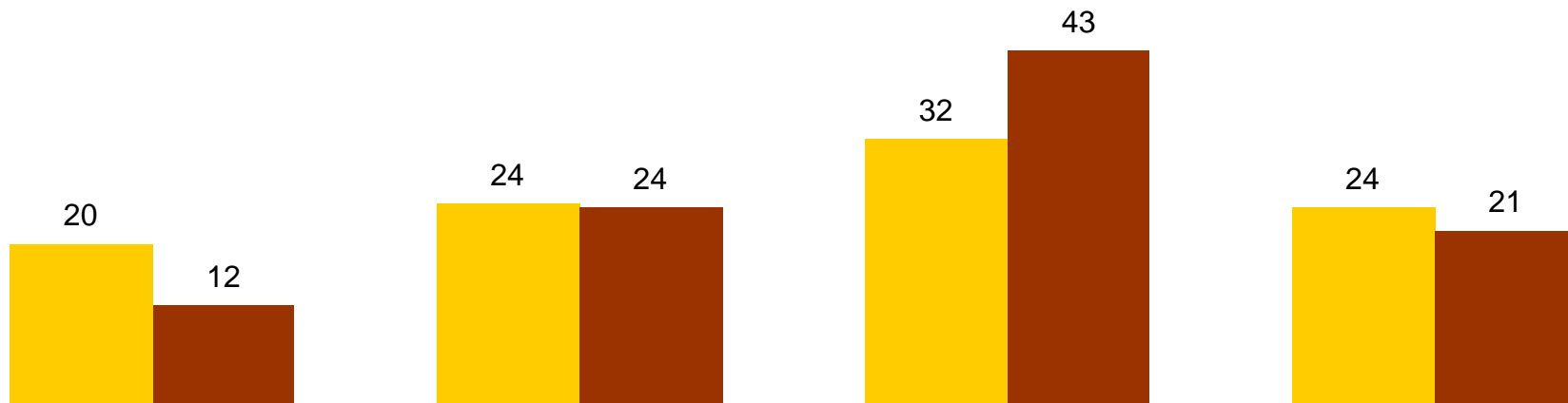
Delaware Avg. Party per Trip Spending by Quarter (\$ Leisure Trips in 2007)



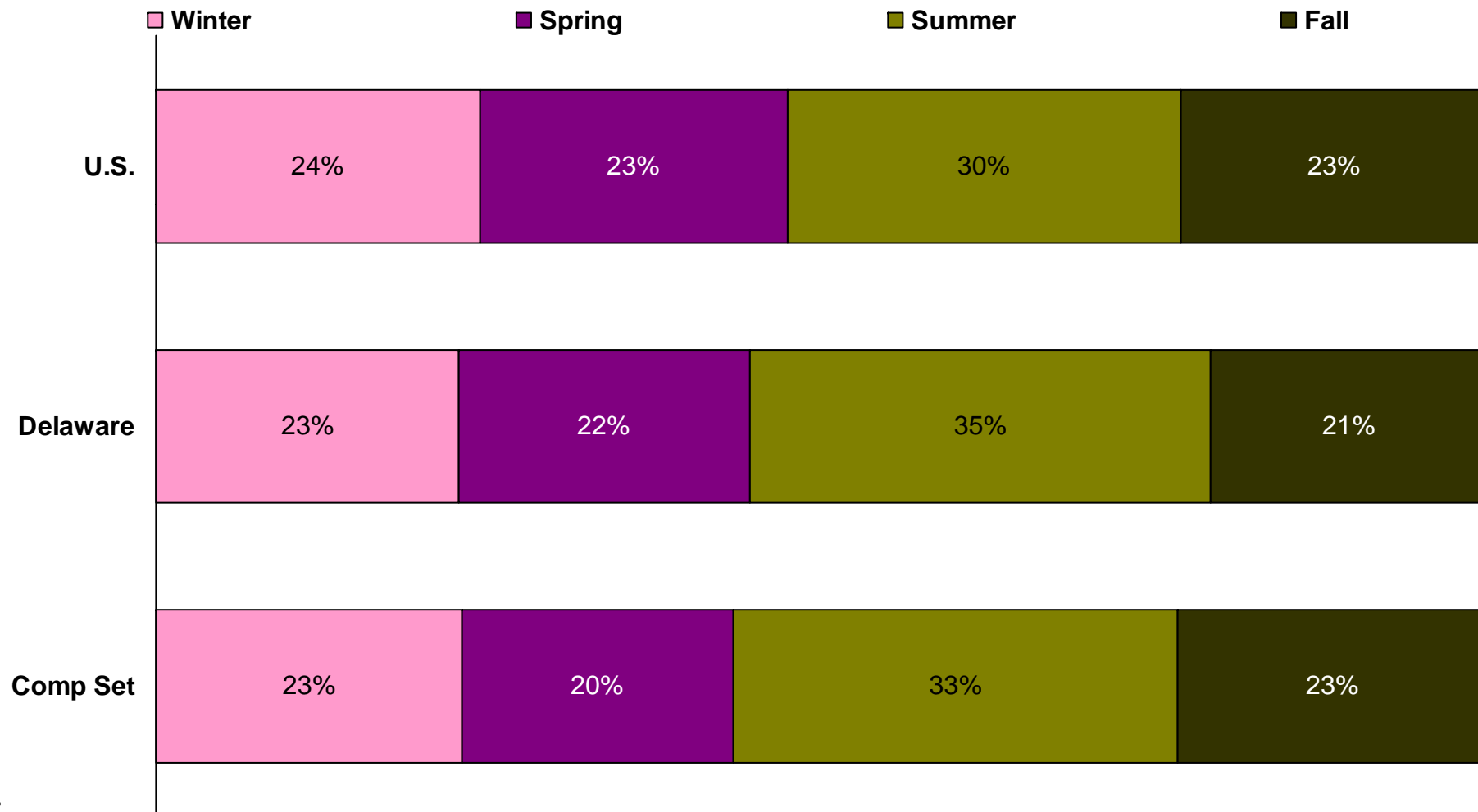
Delaware Trip Timing Comparison by Quarter (% of Leisure in 2007)

■ Trips Based

■ Trip-Dollars Based

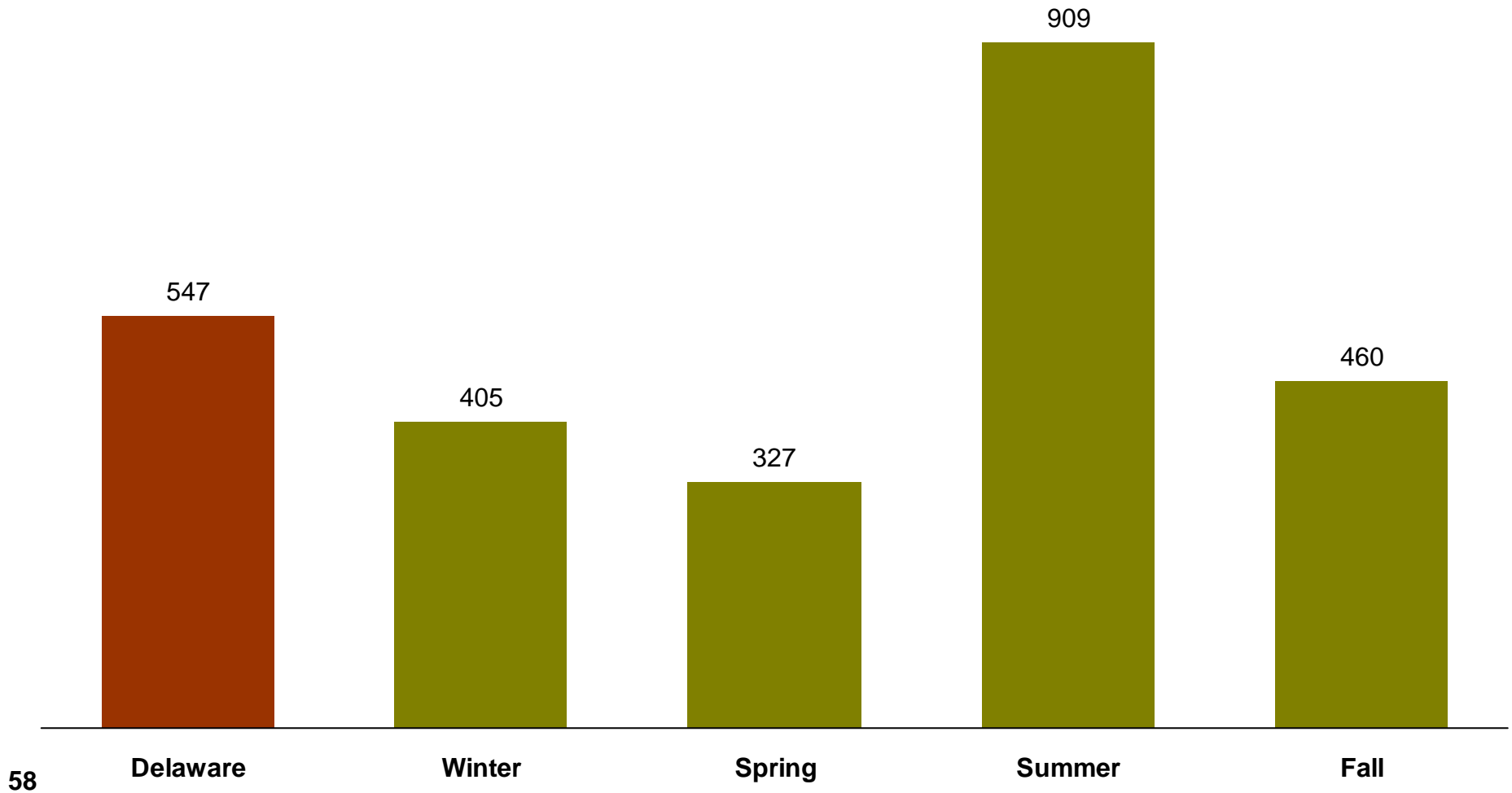


Trip Timing by Season: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)





Delaware Avg. Party per Trip Spending by Season (\$ Leisure Trips in 2007)

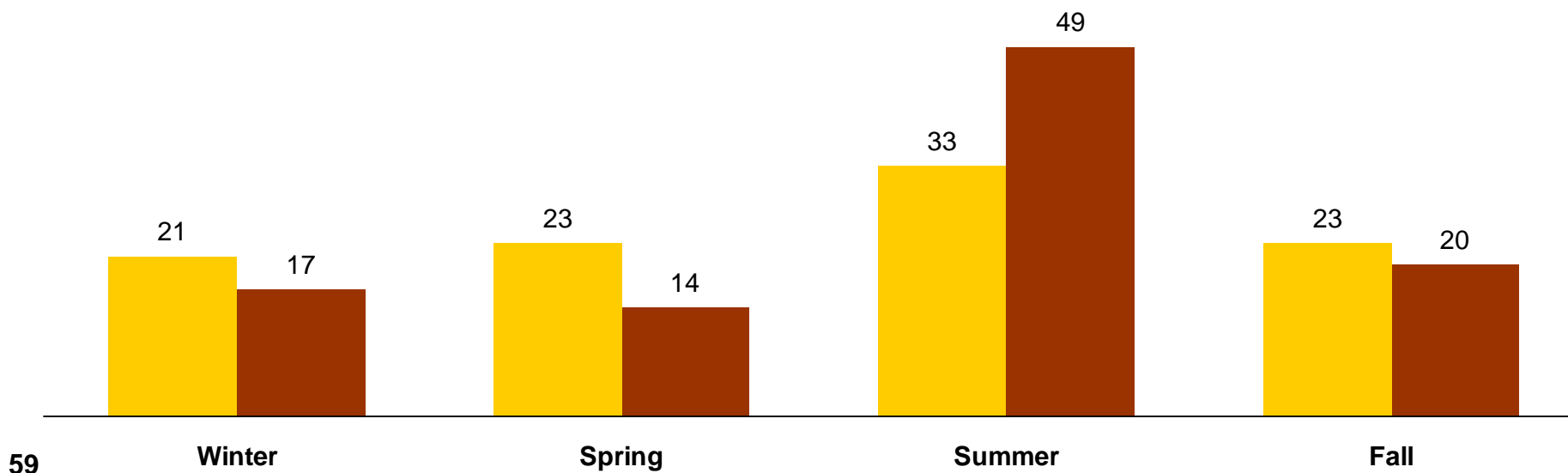


Delaware Trip Timing Comparison by Season (% of Leisure in 2007)

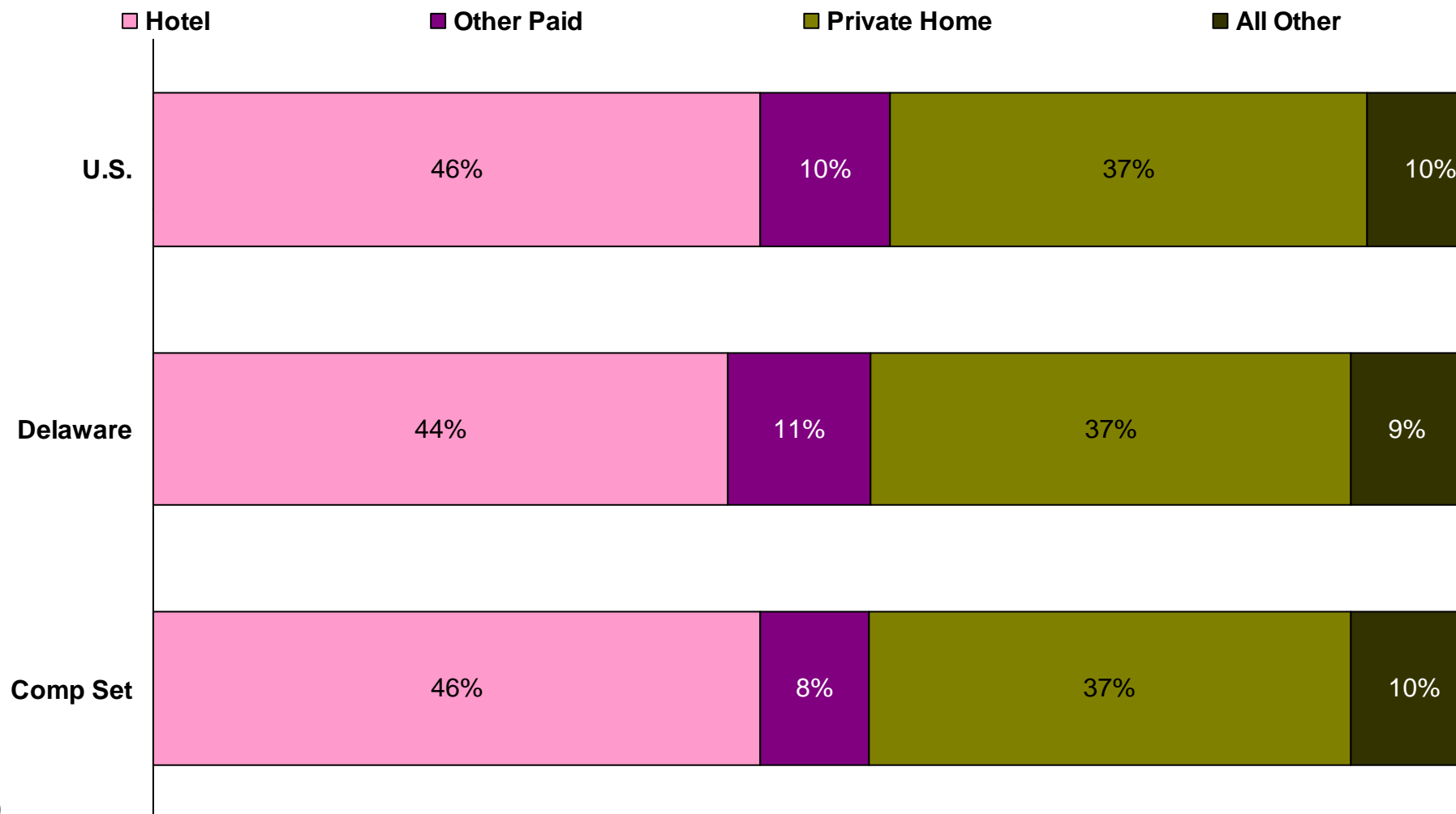


■ Trips Based

■ Trip-Dollars Based



Accommodations Type: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)





Delaware Avg. Party per Trip Spending by Accommodations Type (\$ Leisure Trips in 2007)

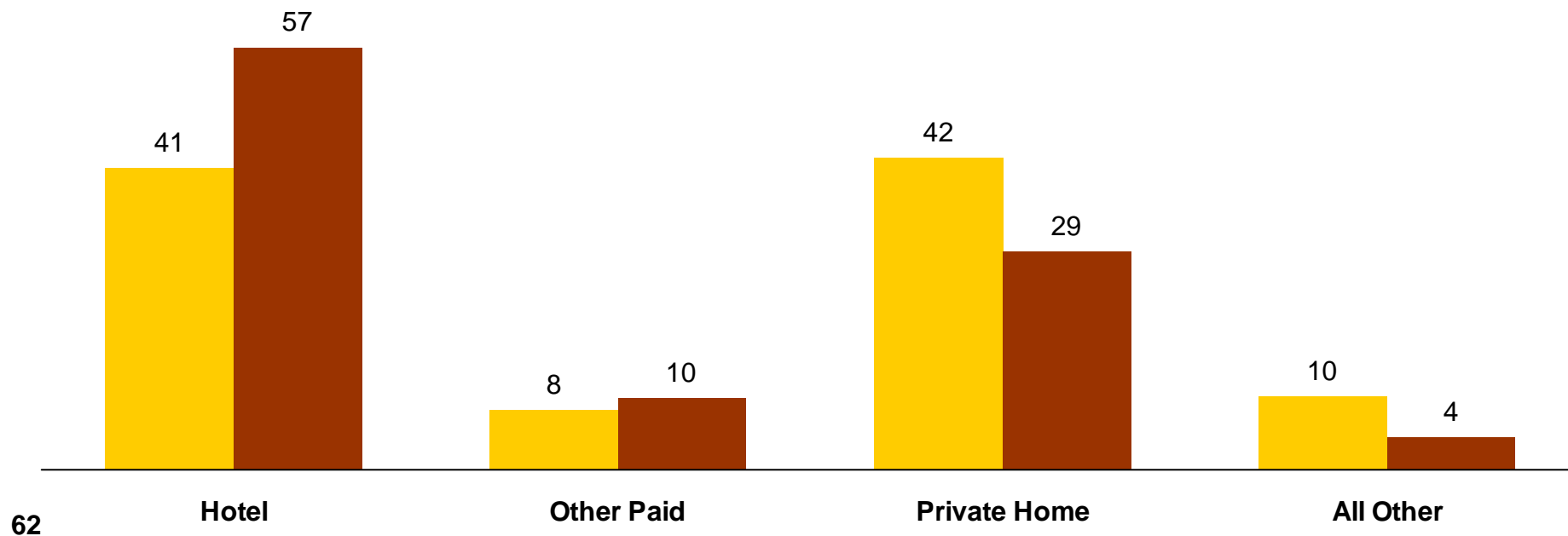


Delaware Accommodations Type Comparison (% of Leisure in 2007)



■ Trips Based

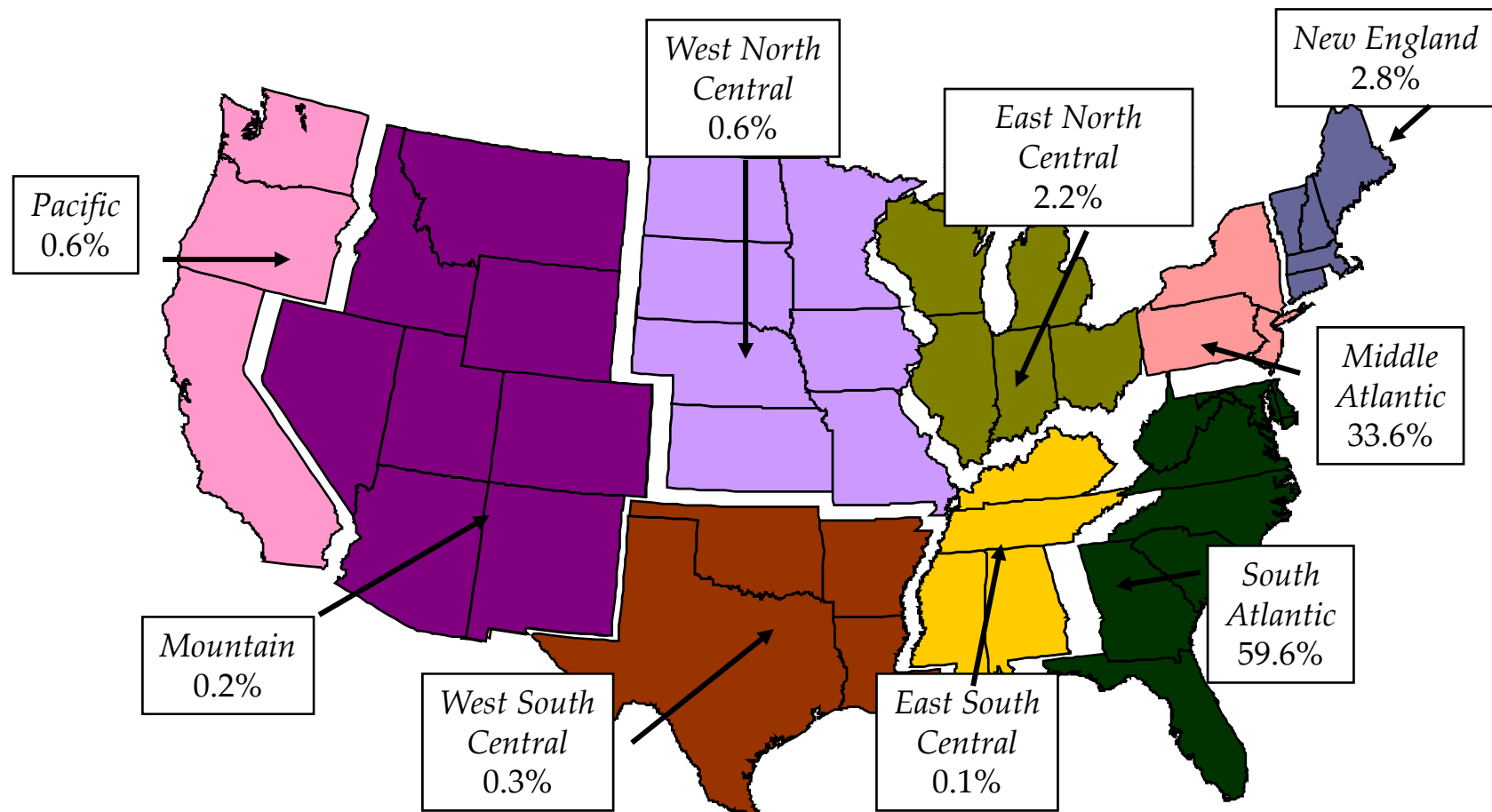
■ Trip-Dollars Based





Top Origin Divisions for Travel to Delaware (% of Leisure Trips in 2007)

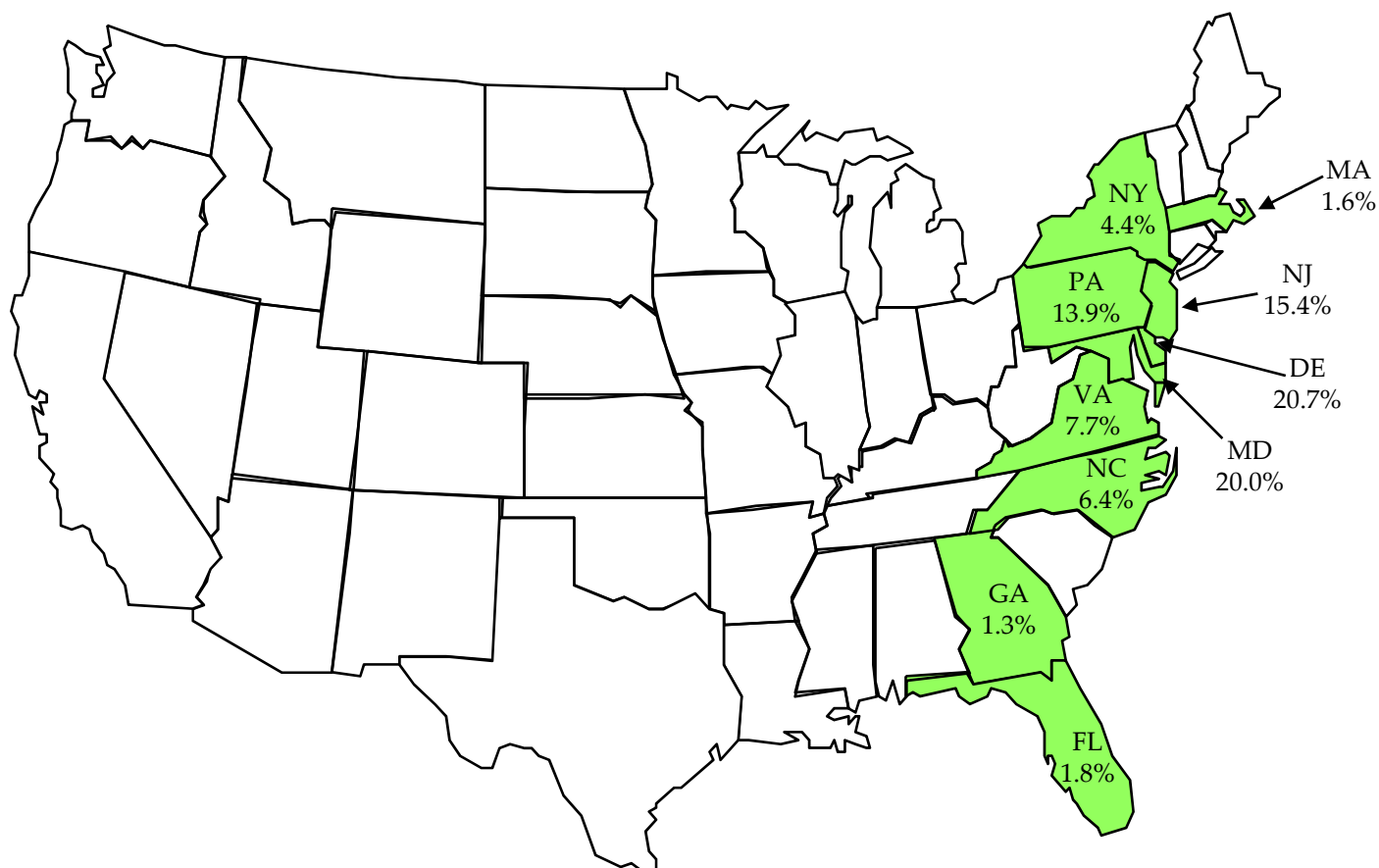
The U.S. Bureau of Census groups states into nine divisions. More than half of Delaware Leisure Trips originate from the South Atlantic division (59.6%). Trips originate throughout the country, but an additional one-third arrive from the Middle Atlantic division (33.6%)



Delaware Top Origin States (% of Leisure Trips in 2007)



Two-fifths of Delaware Leisure Trips originate from either Delaware or Maryland. The top ten states produce 93.2% of Delaware Leisure Trips.





Delaware Top Origin DMAs (% of Leisure Trips in 2007)

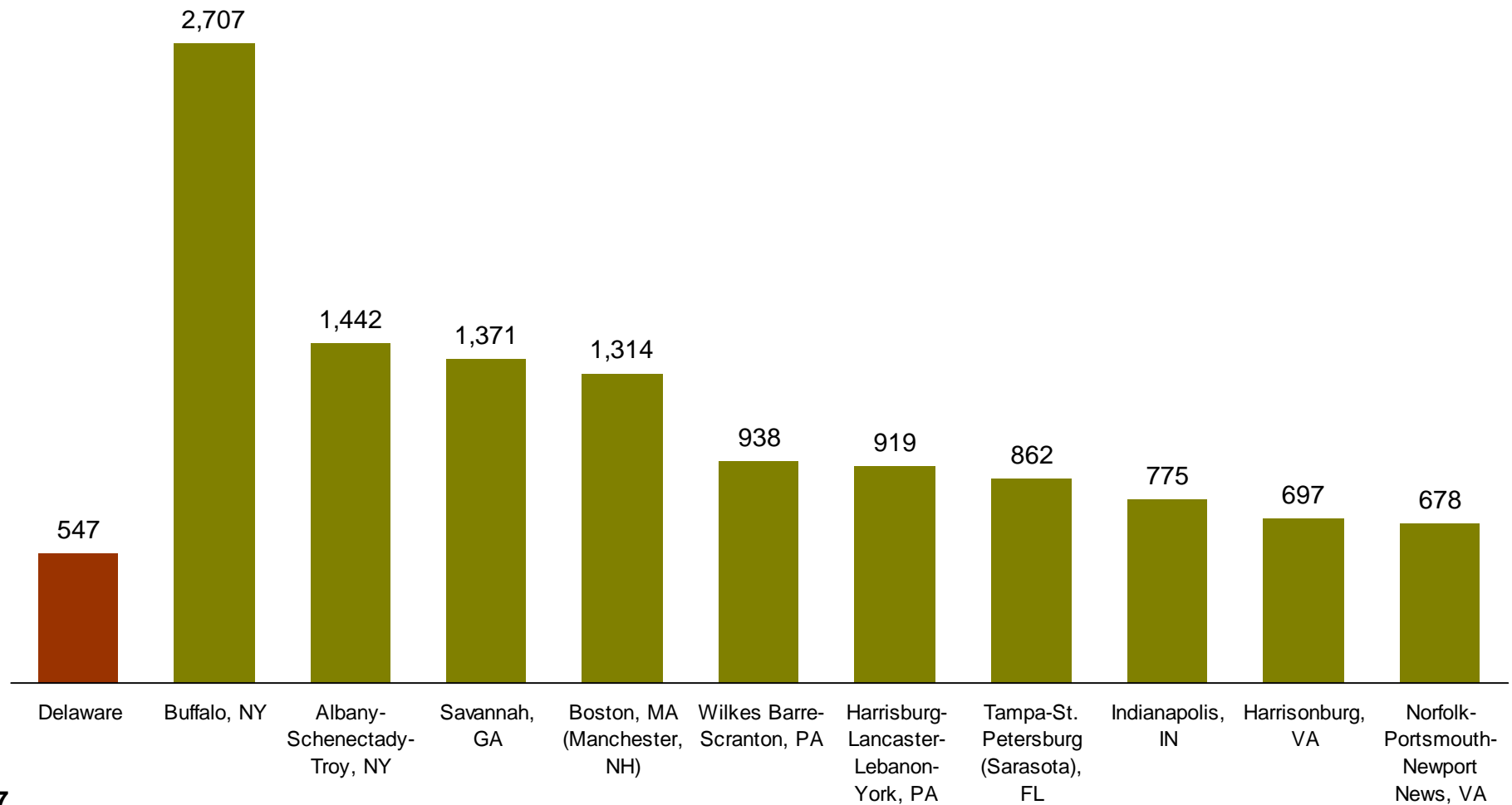


The top ten markets account for 86.3% of all Delaware Leisure Trips. Markets are sorted in descending order by Delaware's top markets.

	U.S.	Delaware	Comp Set
Philadelphia, PA	2.5%	32.9%	11.7%
Baltimore, MD	1.0%	13.0%	4.2%
Washington, DC (Hagerstown, MD)	2.2%	12.5%	8.7%
New York, NY	5.2%	11.8%	21.8%
Salisbury, MD	0.1%	8.1%	0.6%
Harrisburg-Lancaster-Lebanon-York, PA	0.6%	2.3%	3.2%
Norfolk-Portsmouth-Newport News, VA	0.5%	1.5%	1.8%
Wilkes Barre-Scranton, PA	0.5%	1.5%	2.6%
Indianapolis, IN	0.8%	1.4%	0.2%
Boston, MA (Manchester, NH)	2.1%	1.3%	1.9%
Top 10 Sum	15.5%	86.3%	56.7%

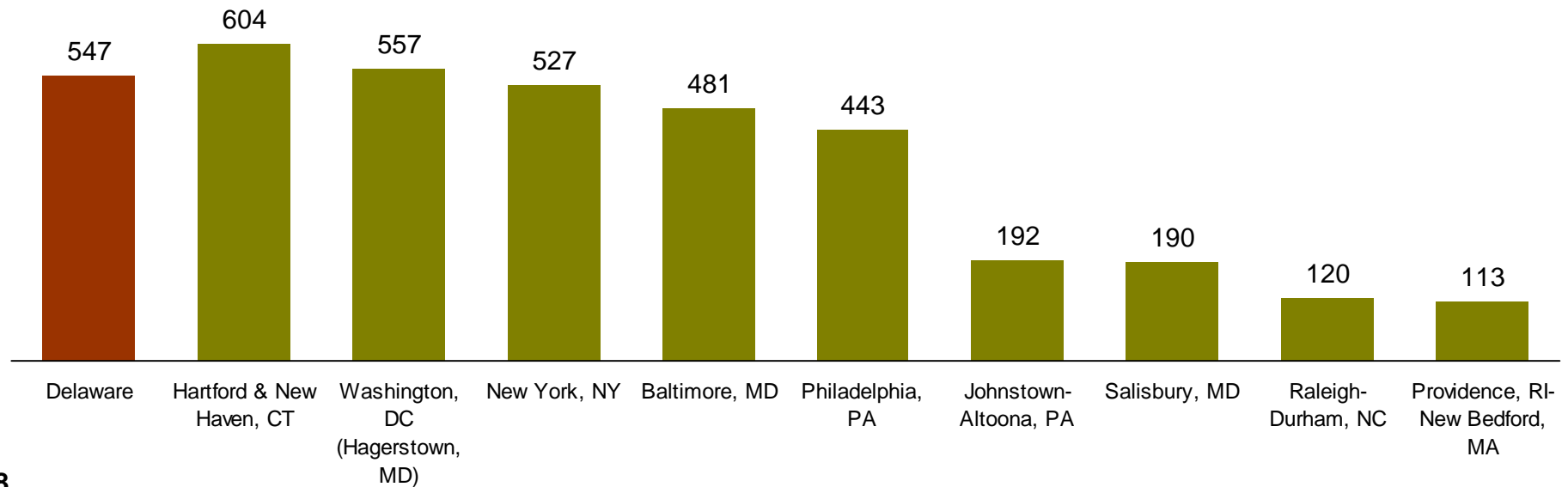


Delaware Avg. Party per Trip Spending by Origin DMA (\$ Leisure Trips in 2007)





Delaware Avg. Party per Trip Spending by Origin DMA (\$ Leisure Trips in 2007)

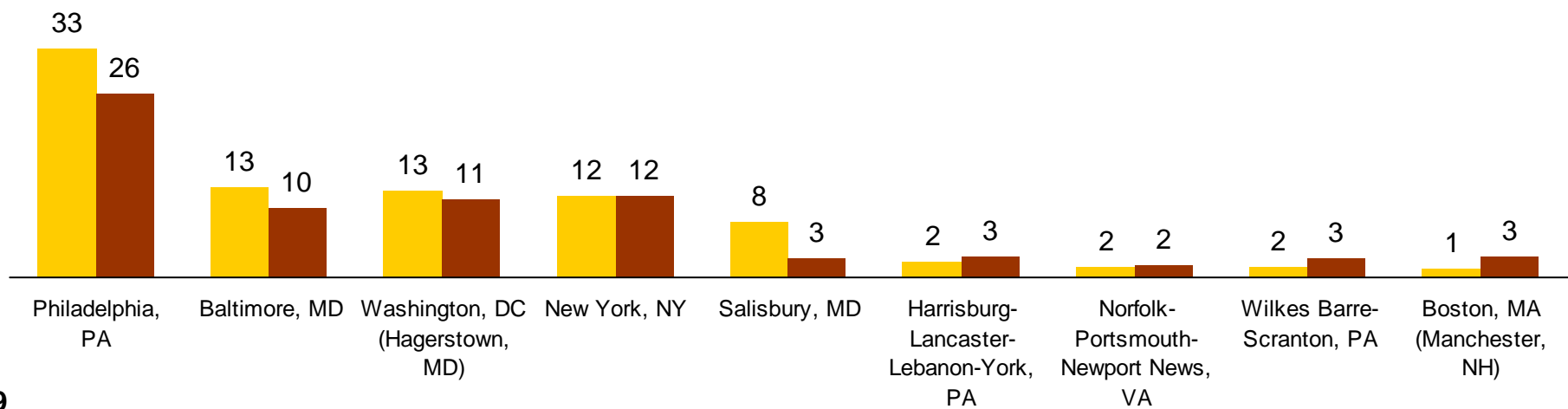


Delaware Origin DMA Comparison (% of Leisure in 2007)



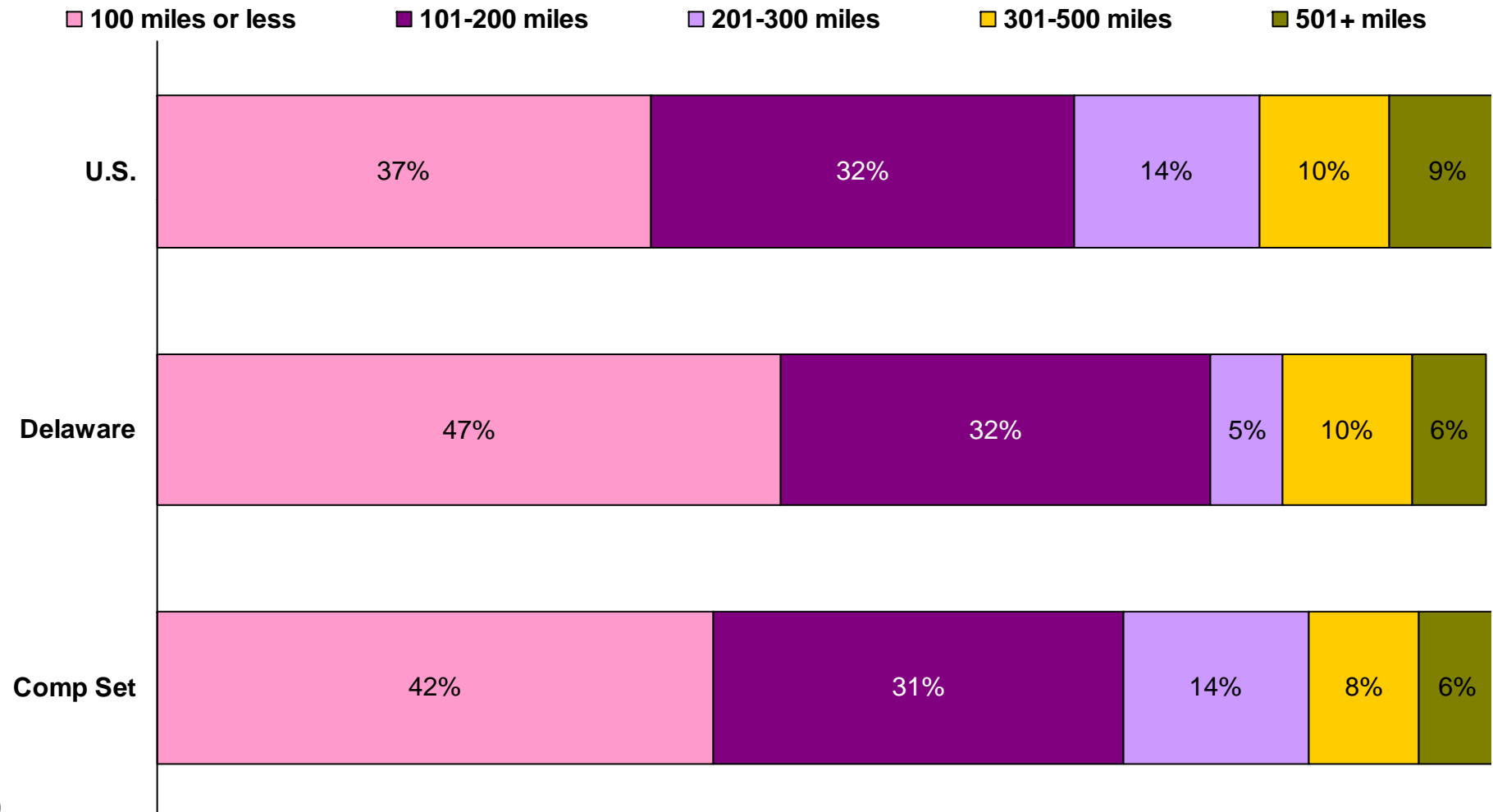
■ Trips Based

■ Trip-Dollars Based



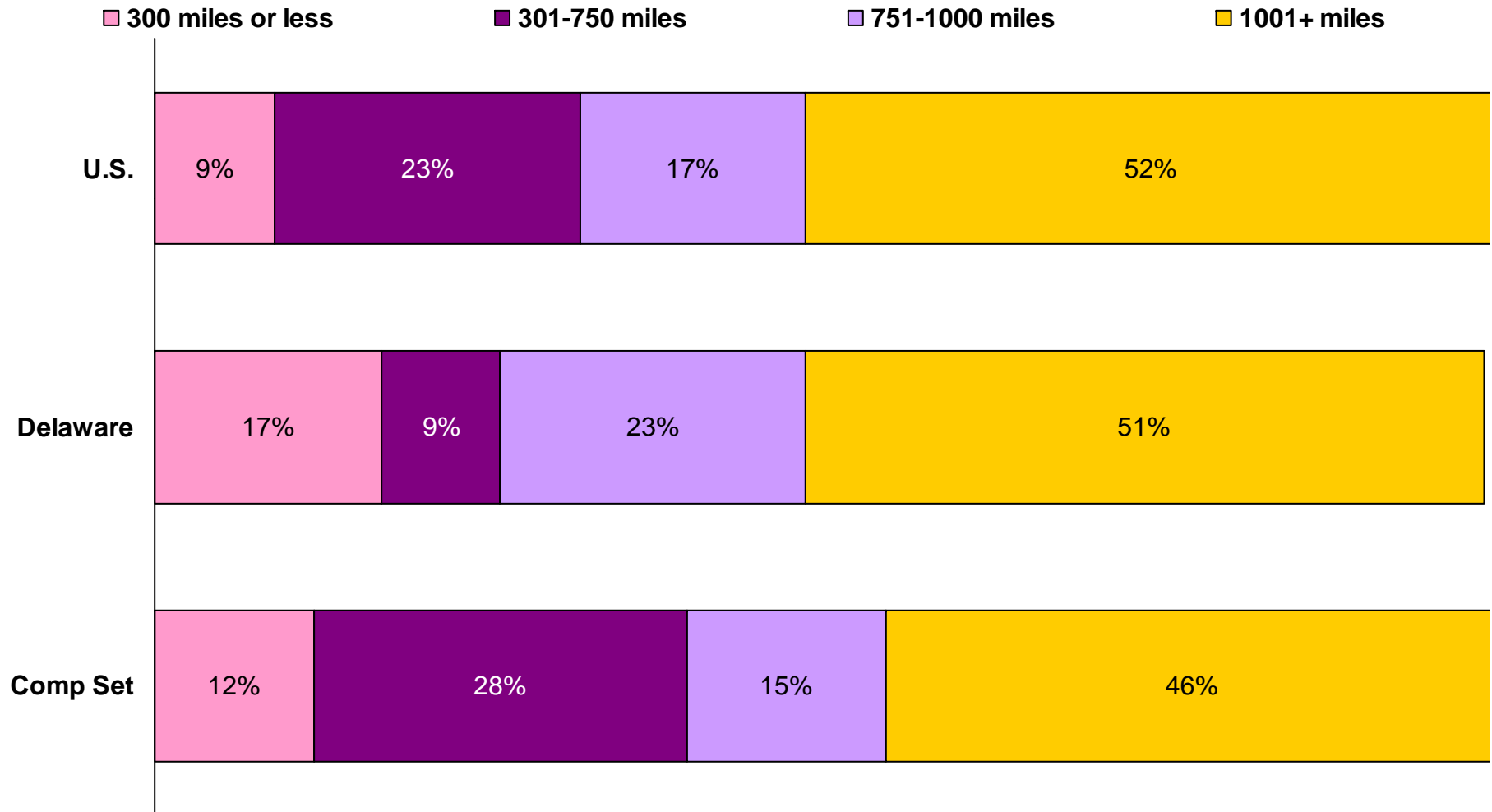


Travel Distance Distribution By Auto: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)





Travel Distance Distribution By Air: U.S., Delaware and Competitive Set (% of Leisure Person-Trips in 2007)





Jeffrey Eslinger
Research Manager

D.K. Shifflet & Associates, Ltd.
1750 Old Meadow Rd. Suite 620
McLean, VA 22102

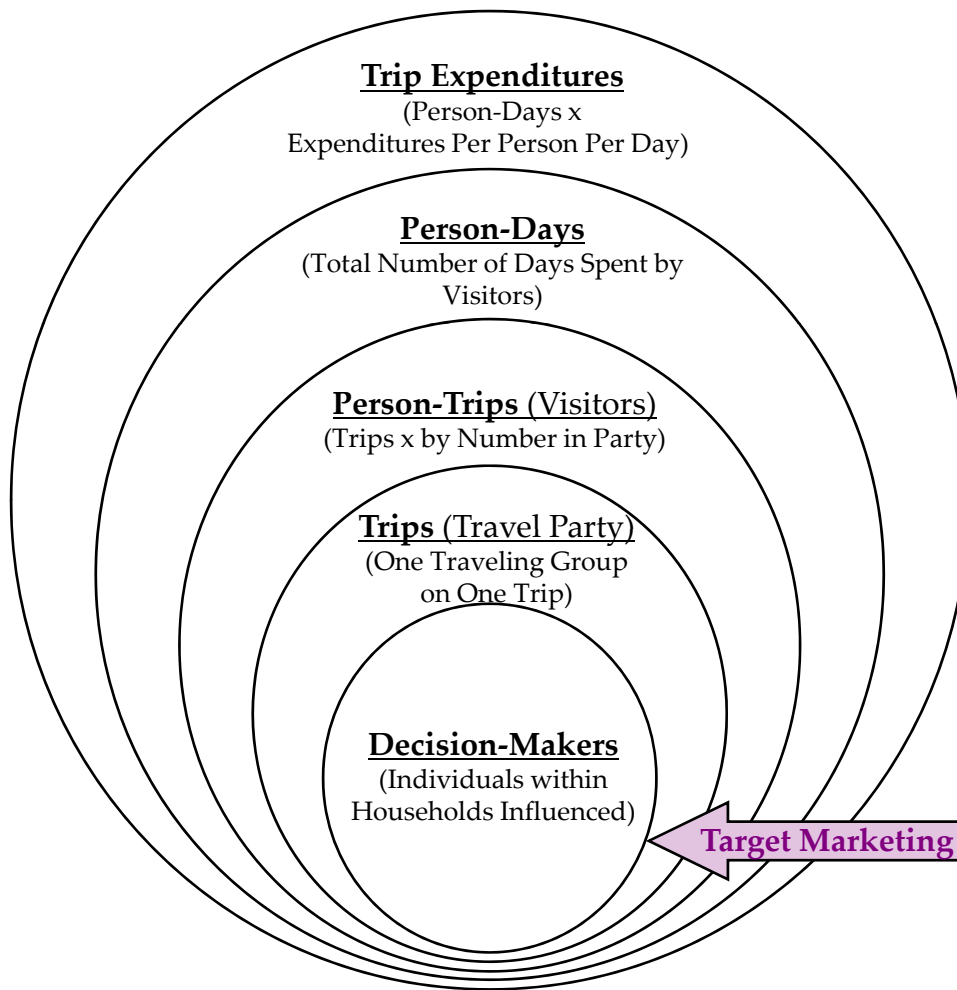
Phone: 703.536.0921
Fax: 703.536.0580
Email: jeslinger@dksa.com
Web: www.dksa.com



- Founded in 1982, D.K. Shifflet & Associates, Ltd. specializes in syndicated and custom market research in the travel and tourism industry.
 - Syndicated - Monitor U.S. Travel behavior: *PERFORMANCE/Monitor*SM - largest, ongoing travel tracking study in industry
 - Custom - Segmentation and positioning studies to assist clients in strategic marketing efforts
 - Clients - include destinations, theme parks, credit cards, auto clubs, hotels chains among others
- To meet the need for quality information, DKSA conducts the largest, ongoing, monthly survey of U.S. consumers' travel behavior—the *PERFORMANCE/Monitor*SM.
 - Each mailing goes to an average of 45,000 households per month
 - Each survey collects the previous 3 months of travel behavior
 - DKSA uses an overlapping monthly mail sequence which reduces sample bias for maximum accuracy
 - More than 75,000 traveling households respond to the survey each year. This results in more than 154,000 Stays at destinations throughout the U.S.
 - New in 2005 - added an average online mailout of 9,000 per month
- DKSA's methodology provides superior quality control measures:
 - We use the Synovate, Inc (formerly Market Facts, Inc.) household panel—households who have agreed in advance to periodically participate in mail and phone surveys. Extensive information about the household and its members is obtained at the time of household recruitment. Thus, a key advantage of the household panel is knowing to whom surveys are sent and from whom surveys are received. Another key advantage of the panel method is higher response rates to surveys—typically 2 to 3 times higher.
 - The 45,000 average monthly mailings as well as returned questionnaires are balanced to the U.S. population across six demographic variables (age, gender, income, education, number of adults, and state of residence). This rebalancing ensures findings are reflective of the U.S. population and enables findings to be projected to the entire U.S. population.



- Returned questionnaires go through an extensive set of manual (visual) and automatic (computer program) processing checks to improve data quality. Questionnaires containing anomalies are discarded or corrected based on insights developed from more than a decade of processing experience.
- All volume estimates in this report are based on a revised visitor volume methodology. The revisions reflect changes in the national-level model and the incorporation of a small-area estimation model. The national-level revisions were necessary following the dramatic changes to travel behavior following September 11, 2001. The small-area estimation component adds enhanced reliability to quarterly and annual estimates by using other data sources (such as hotel room demand and government transportation statistics) as data “anchors” or “reality checks.” Data reported reflect the influence of the revised volume model and the influence of revised population estimates resulting from the 2000 Census.
- Data tables that show all the detailed data collected in this study are delivered to the client. Responses are shown for the total sample as well as key subgroups. The percentages of some questions may exceed 100% due to the rounding of numbers and/or multiple responses permitted for that particular question.



- DKSA can present the results of our ***DIRECTIONS® PERFORMANCE/MonitorSM*** study of U.S. travelers at many levels. Each level of reporting is used for different purposes.
- The largest measure of visitor volume is *Trip Expenditures* and answers the question “How much did they spend”?
- To answer the question of “How many people came and bought your product (destination)?”, the number of people who visited and how long they stayed is reported in *Person-Days*. *Person-Days* is a cumulative measure of total volume of travel generated by travelers, and is therefore an appropriate measure to use when discussing a destination’s volume and relative market share.
- In contrast, the number of *Person-Stays* taken to a destination tells you how many people came to your destination, but not how long they stayed.
- People often travel together with family, friends or with other groups. The number of *Stays* tells you how many distinct groups of travelers came to your destination.
- The smallest unit is the *Decision-Maker*, commonly the target of your marketing efforts.



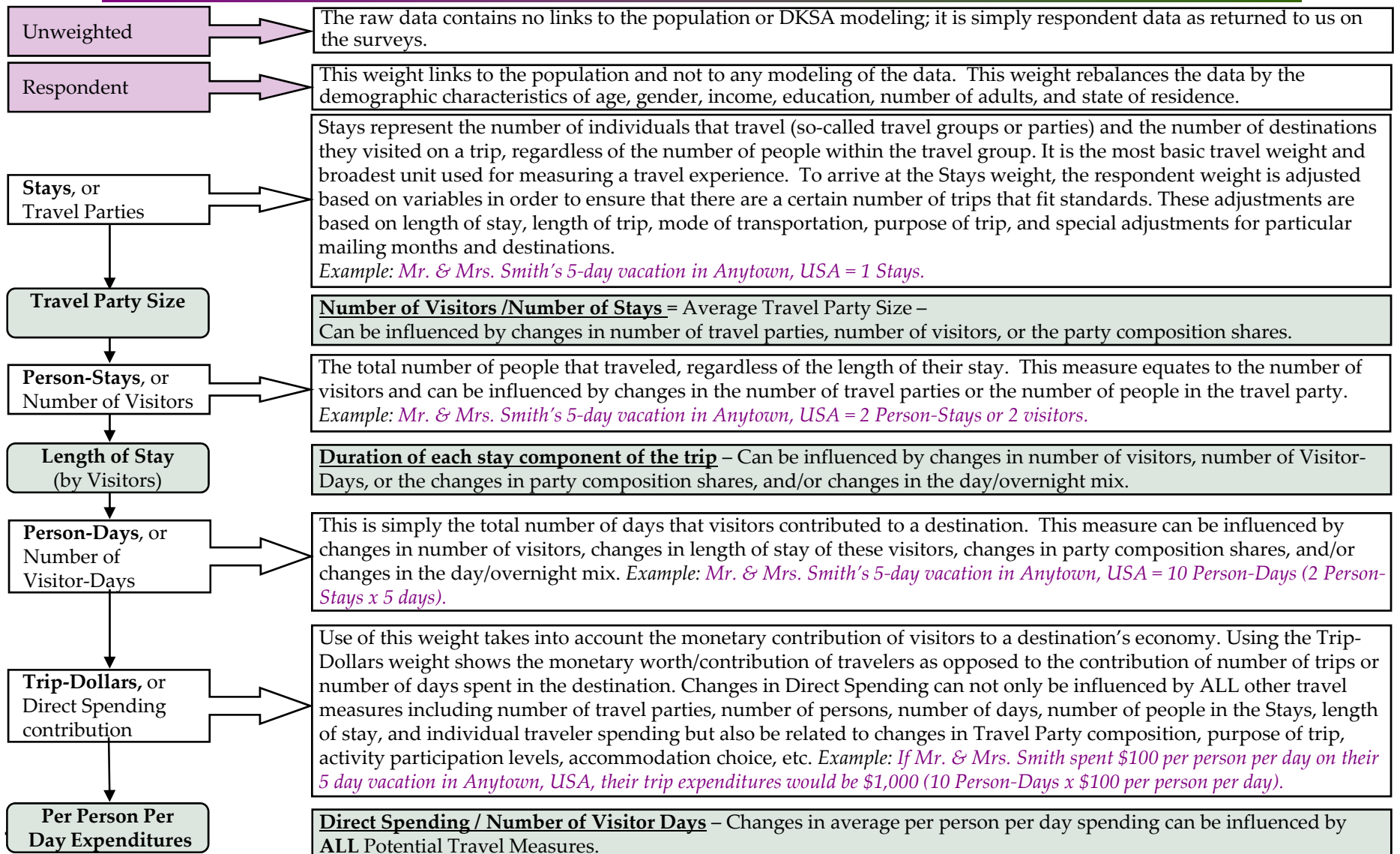
- It is important to understand the various ways in which to measure a destination's travel market performance. Visitation to a market can be measured in terms of key, interrelated travel measures, such as:

- Stays
- Average Travel Party Size
- Person-Stays
- Average Length of Stay
- Person-Days
- Direct Spending
- Expenditure Per Person Per Day

Changes in five of these travel measures are caused by changes in other related travel measures. The graphic on the next slide depicts how these travel measure variables are related to each other. When interpreting destination travel data, remember to consider how the travel measures are interrelated to determine drivers of changes in your travel marketplace.

- In most cases, use of weights depends on what you are trying to learn through the data. A weight makes a particular case, or response, more or less important. There are not necessarily any **RIGHT** or **WRONG** weights to use in most cases. However, there are some variables that **MUST** use a specific weight.

Travel Measures Defined



General Rules of Thumb when Choosing Weights

When selecting the proper weights to apply to data, the following general rules apply. There are a few important exceptions, which will be described.

- When profiling visitors to a destination, the *Person-Stays* weight is generally preferred for the overall profile because the objective is to understand the travel behaviors and characteristics of the entire population of the destination's visitors.
- When running data to help determine potential travelers (behaviors and characteristics), *Stays* would be the appropriate weight. This is because you profile or describe the individual visitors, but you market via various forms of media to households, not individuals. Households are generally the Travel Party who comprises the "stay" in your destination.
- The variable of Party Size has an impact on every variable except *Stays*.

Note: There is a strong correlation between party size and length of stay! Be careful saying that your visitors are staying longer if you see an increase in the average length of stay. In fact, it may be the case that the visitors were not really staying for longer periods of time but that there was actually an increase in party size or in share of travel parties. Especially families (which have a larger party size) tend to stay for longer periods of time.

	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Age	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Income	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Party Composition	Stays	Trip-Days	Room-Nights	Trip-Dollars
Occupation	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Education	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Length	Person-Stays	Person-Stays	Stays	Trip-Dollars
Transportation	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Accommodations	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Expenditures	Person-Days	Person-Days	Person-Days	Person-Days
Stay Purpose	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Activities	P-Stays or Stays	P-Days or Stays	Stays	Trip-Dollars
Distance	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Seasons	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Ratings	Person-Stays	Person-Days	Room-Nights	Trip-Dollars
Origin Markets	Person-Stays	Person-Days	Room-Nights	Trip-Dollars



Party Composition

Party Composition is best run using the Stays weight (if you are running it in conjunction with other data use Person-Stays weight). The reason for this is that party composition already takes into account the “people” on the trip. So, you would not want to weight it using Person-Stays, which also takes into account the number of people, or party size. If you run party composition weighted by Person-Stays, then larger Stays, such as Families, would get heavier weights and smaller Stays such as Couples or Adults Traveling Alone would get lower weights than they should. In a sense, you would be double counting.

Expenditures

Expenditures must always be run using the Person-Days weight. This is due to the way we ask the question in the *PERFORMANCE/Monitor*SM. We ask respondents to indicate how much they spent per person per day.

Length of Stay

Length of Stay should never be run using Person-Days, Person-Stays or Room-Nights weights, and should only be run using the Stays weight. This is because this measure already takes into account the number of days a respondent is spending on the Stay. So, running length of stay using Person-Days would be double counting – giving higher weights to those who stayed longer (more days). Room-Nights also include a length of stay concept. Person-Stays weight contains the element of party size. Using the Person-Stays weight for length of stay may result in a false understanding of change in Length of Stay due to the strong correlation of Length of Stay and Party Size.

Activities

Activities should be run using the Stays or Person-Stays, never Person-Days weight. Running activities in Person-Days makes the assumption that each person on the stay participated in each activity for each day. Running activities in Person-Stays makes the assumption that each person on the stay participated in each activity. Running activities using the Stays weight makes the assumption that at least one person on the stay participated in an activity on at least one day of the stay.



VARIABLES	EXPLANATION
Repeat Visitation	represents the number of visits to the destination in the past three years, including the visit being reported. Provided for cities only.
Children in Household	Sum exceeds 100% due to multiple-children households.
Travel Party Composition	<p>Children Present is defined as one or more adults accompanied by one or more persons under age 18. The child necessarily has to live in the household.</p> <p>MM/FF include either two females or two males from different households traveling together.</p>
Activities	<p>Entertainment Dining Shopping } These activities are based on minimum spending levels; Entertainment (>\$10), Dining (>\$20), Shopping (>\$20). All other activity incidence is based on activities selected from a list. Note that the sum of all activity participation exceeds 100% as a function of the survey, whereby up to four activities per stay may be selected.</p>
Average Party per Stay Spending	<p>The destination's total average party per stay spending includes the reported expenditures of all travelers (including transportation expenditure) who spent more than \$1 on their stay at the destination.</p> <p>Individual averages for subgroups of variables, such as accommodation types or activities might be higher than the total average party per stay spending for a destination because the travelers' spending is included only in those subgroups of variables to which the respondent replied.</p>

The confidence interval table indicates how well the data, based on a sample, reflects the entire population of travelers. The smaller the interval, the more relevant the data and the greater confidence we have that the sample number represents the population. For example, if the air travel finding for the U.S. is 6% and the sample size is 157,302, using the chart below, we can say that at the 90% level of confidence the proportion ranges between 5.9% and 6.1%. Because it reflects a good balance between accepting a difference in findings as real when it in fact is not, and rejecting a difference as not real, when it actually is (in statistical terms, the tradeoff between making a "Type I" and "Type II" error).

	Percentage Finding in Report or Data Tables					
	Sample Size for 2005-07	At or near 2% or 98%	At or near 5% or 95%	At or near 10% or 90%	At or near 25% or 75%	At or near 50%
Leisure						
U.S.	157,302	0.0%	0.1%	0.1%	0.2%	0.2%
Delaware	950	0.5%	1.0%	1.4%	2.0%	2.7%
Comp Set	30,553	0.1%	0.2%	0.2%	0.4%	0.5%



The chart below compares two proportions from different samples for statistical significance.

Instructions:

Enter the proportion for each sample and sample size in the appropriate cells in the data input section, using the Z Score Table, compare the resulting Z score with the Z score corresponding to your desired confidence level. If the resulting Z score is greater than the table Z score, the difference between the two proportions is statistically significant. If the resulting Z score is lower, there is no significant difference.

For example, if the air travel finding for U.S. is 17% in pervious time period and 15% in current time period, using the chart below, we can say that the actual proportion change is not statistically significant since the resulting Z score (1.52) is smaller than the table Z score (1.64).

Data Input	Sample 1	Sample 2	Resulting Z Score	Z score	Confidence Level
Proportion	17.0%	15.0%		1.96	95%
Sample Size (n)	1600	1500	1.52	1.64	90%



D.K. SHIFFLET & ASSOCIATES, LTD
DIRECTIONS® PERFORMANCE/MONITORSM
SURVEY QUESTIONS (3-17-05)

Sample Contacted Annually: 540,000 Households

45,000 Per Month - Every Month - Year After Year

[unless otherwise identified, each measure generally available by month back to 1992]

1. Age of Respondent [Open End/Actual]
Gender of Respondent ☐ Male ☐ Female

2. List your frequent traveler programs and travel club memberships (name of airlines, hotels, rental cars, auto club: AAA, etc; AARP). (List up to 6) [Open End/Coded]

3. **Last 12 months**, number of nights you stayed in paid lodging (e.g. hotel, condo, ship, campground) for:
Business: Number of Nights [Open End/Actual]
Leisure : Number of Nights [Open End/Actual]
Theme Parks: Number of Times [Open End/Actual] *Added 06/96*

4. **Past 3 months** travel, both business and Leisure , how many did you take of:
- 4a. Overnight Trips: A night away from home, local or distant.
Overnight Trips: Number of Times [Open End/Actual] (*"0" if none*)
- 4b. Day Trips: out of your local area (50+ miles one way).
Day Trips: Number of Times [Open End/Actual] (*"0" if none*)

If "0" to both questions 4a and 4b, stop here. Otherwise continue with question 5.



5. Answer for all day and overnight trip(s) in the past 3 months. (up to 9 trips)

5a. **TRIP**

Trip Start: Month and Date

[Open End/Actual]

Trip Length: Number of Nights

[Open End/Actual] ("0" if day trip)

Was the trip a group tour?

[Y/N]

5b. **Stays COMPOSITION**

Number of Men

[Open End/Actual]

Number of Women

[Open End/Actual]

Number of Kids Age 0-17

[Open End/Actual]

Number from your Household

[Open End/Actual]

5c. **TRANSPORTATION**

Main Mode of Transportation:

1 Airline

6 Van/ SUV/ Small Truck

2 Amtrak

7 Large Truck

3 Car

8 Ship

4 Bus

9 Other

5 Camper/ RV

Payment Method:

1 Cash/ Check

6 Diners' Club

2 American Express

7 Other Card

3 MasterCard

8 Company Direct Bill

4 Visa

9 Points/ Miles

5 Discover

10 Other/ Free

Reservation Type:

1 No Reservation

5 Airline Co. Website Added 11/02

2 800 Phone #

6 Other Website Added 11/02

3 Corp. Travel Dept.

7 Other

4 Travel Agent

AIRLINE

If used, name main airline:

[Open End/Coded]

Satisfaction Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Value Rating: 1-10 Scale

(1= Poor, up to 10 = Excellent)



RENTAL CAR

If rented a Car/Truck, name the company

Satisfaction Rating: 1-10 Scale

Value Rating: 1-10 Scale

Car Rental Payment Method:

[Open End/Actual]

(1=Poor, up to 10=Excellent)

(1=Poor, up to 10=Excellent)

1 Cash/Check

2 American Express

3 MasterCard

4 Visa

5 Discover

6 Diners' Club

7 Other Card

8 Company Direct Bill

9 Points/ Miles

10 Other/ Free

5d. EXPENDITURES BY CATEGORY ("0" if none for You Only)

Trip Package \$ (Fly/Hotel, Cruise, Group Tour, etc.)

[Open End/Actual]

NOT IN PACKAGE

Main Transportation \$

[Open End/Actual] Added 07/96

Rental Car \$

[Open End/Actual] Added 07/96

Food/Drink \$

[Open End/Actual]

Entertainment/Recreation \$

[Open End/Actual]

All Shopping \$

[Open End/Actual]

All other except Accommodations

[Open End/Actual]

6. For all day and overnight trip(s) in the past 3 months, list each city visited.

6a. WHERE and WHEN

City (e.g. Miami): (If out of U.S., write city and country)

[Open End/Coded]

State (e.g. FL):

[Open End/Coded]

CITY RATINGS

Overall Destination Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Destination Value Rating: 1-10 Scale

(1=Poor, up to 10=Excellent)

Number of visits in the last 3 years:

[Open End/Actual] Added 05/96, Changed 03/01

TRIP TIMING

Trip Start: Month and Day

[Open End/Actual]

Trip Length: Number of Nights

[Open End/Actual] ("0" if day trip)



6b. PURPOSE OF STAY

	Company Business	Leisure /Personal	
"Group Meeting"	{ 1 Convention 2 Training/ Seminar 3 Other Group Meeting	10 Getaway Weekend 11 General Vacation	{ "Leisure Vacation"
"Transient Business" <i>Changed 03/01</i>	{ 4 Client Service, Consulting 5 Inspection, Audit 6 Construction, Repair 7 Sales, Purchasing 8 Government/ Military 9 Other Company Business	12 Visit Friend/ Relatives 13 Special Event 14 Other Personal	{ "Leisure Non- Vacation"
Both Leisure and Business?	[Y/N] <i>Added 03/01</i>		

ACTIVITIES

List primary activities for each visit (list up to 4) and circle activity if it was main reason for the trip:

- | | |
|---|---|
| 1 Eco-Travel <i>Added 03/01</i> | 11 Hunt, Fish, etc. |
| 2 Parks: National, State, etc. | 12 Snow Ski, Snow Board |
| 3 Visit Historic Sites | 13 Other Adventure Sports |
| 4 Museum, Art Exhibit, etc. <i>Added 03/01</i> | 14 Play Golf |
| 5 Concert, Play, Dance, etc. <i>Added 03/01</i> | 15 Beach/ Waterfront |
| 6 Festival, Craft Fair, etc. | 16 Boat/ Sail |
| 7 Night Life | 17 Show: Boat, Car, Home, etc. |
| 8 Gamble | 18 Theme/ Amusement Park |
| 9 Watch Sports Event | 19 Touring/ Sightseeing |
| 10 Hike, Bike, etc. | 20 Look at Real Estate <i>Added 06/03</i> |

6c. OVERNIGHT ACCOMMODATION

ACCOMMODATION STAYED

Name of Hotel/ Motel, Shipline, etc. (use chain/ hotel, and extension names, e.g. Seasons Inn Express).
[Open End/Coded] *If friend/ relatives' home, use "Friend"*

ACCOMMODATION RATINGS

Overall Satisfaction: 1-10 Scale (1=Poor, up to 10=Excellent)
Value Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
Service Rating: 1-10 Scale (1=Poor, up to 10=Excellent)



How many stayed in your room:
Suite Room?

[Open End/Actual]
[Y/N]

Location of Accommodation:

- | | |
|---------------------|---|
| 1 Airport | 5 Small Town |
| 2 Downtown | 6 Government Park |
| 3 Suburban | 7 Ship |
| 4 Highway | 8 Other |
| 1 "All Suite" Hotel | 7 Ship/ Cruise |
| 2 Resort Hotel | 8 My 2nd home/ apt/ condo |
| 3 Hotel/ Motel | 9 Home/ apt/ condo (not mine) |
| 4 Timeshare | 10 Corporate Apartment <i>Added 07/04</i> |
| 5 Bed & Breakfast | 11 Other |
| 6 Camping/ RV | |

Reservations for Accommodations:

- | | |
|----------------------|--|
| 1 No Reservation | 5 Travel Agent |
| 2 Chain 800 phone # | 6 Hotel Chain Website <i>Added 11/02</i> |
| 3 Direct to location | 7 Other Website <i>Added 11/02</i> |
| 4 Corp. Travel Dept. | 8 Other |

How Paid for Accommodations:

- | | |
|------------------------|------------|
| 1 Self/Friend/Relative | 4 Per Diem |
| 2 Expense Account | 5 Free |
| 3 Company Direct Bill | |

Payment for Accommodations:

- | | |
|--------------------|-----------------------|
| 1 Cash/ Check | 6 Diner's Club |
| 2 American Express | 7 Other Card |
| 3 MasterCard | 8 Company Direct Bill |
| 4 Visa | 9 Points/ Miles |
| 5 Discover | 10 Other/ Free |

ACCOMMODATION EXPENDITURE

Dollars Per Night (Room Only)

[Open End/Actual]

Total Hotel/ Lodging Bill

[Open End/Actual]

Special Deal?

[Y/N]

If in area again, will stay here?

[Y/N] *Added 11/03*



DEMOGRAPHICS

Number of Persons in Household:

[Actual]

Annual Household Income:

1	Less than \$5,000	15	\$40,000-\$44,499
2	\$5,000-\$7,500	16	\$45,000-\$49,999
3	\$7,500-\$9,999	17	\$50,000-\$59,999
4	\$10,000-\$12,499	18	\$60,000-\$74,999
5	\$12,500-\$14,999	19	\$75,000-\$84,999
6	\$15,000-\$17,499	20	\$85,000-\$99,999
7	\$17,500-\$19,999	21	\$100,000-\$124,999
8	\$20,000-\$22,499	22	\$125,000-\$149,999
9	\$22,500-\$24,999	23	\$150,000-\$174,999
10	\$25,000-\$27,499	24	\$175,000-\$199,999
11	\$27,500-\$29,999	25	\$200,000-\$249,999
12	\$30,000-\$32,499	26	\$250,000-\$299,999
13	\$32,500-\$34,999	27	\$300,000
14	\$35,000-\$39,999		

Occupation of Adult Heads of Household:

1	Managerial/Professional	6	Operator, Laborer
2	Technical, Sales, Admin.	7	Student, Other
3	Service	8	Retired
4	Farming, Forestry, Fishing	9	Not Employed
5	Craftsman, Repairman		

Education of Adult Heads of Household: *Changed 10/02*

1	Attended Grade School	5	Attended College
2	Graduated Grade School	6	Graduated College
3	Attended High School	7	College Post Graduate
4	Graduated High School		

Marital Status of Head of Household: 1 Married

2 Never Married

3 Divorced/ Widowed/ Separated

Children in Household (Age and Gender):

[Actual]

Location of Household:

State, DMA, ZIP Code, MSA, County

PRIZM coded respondents to block level address

All can be linked to Claritas PRIZM/Clusters and other databases

Available to clients as special purchase.



Appendix C – 2007 Travel Industry Overview



DKSA Domestic Volume and Direct Spending

Economy in Review

Economic Indicators

Travel Events Summary

DKSA Domestic Volume and Direct Spending

Small Area Model (June 2007)	2007	2006	2005	2004	07/06	06/05	05/04
Hotel Room Night Volume (million)							
Total	958.0	946.7	950.0	923.1	1.2%	-0.3%	2.9%
Business	446.7	442.5	456.5	460.9	1.0%	-3.1%	-1.0%
Leisure	511.2	504.3	493.5	462.2	1.4%	2.2%	6.8%
Stays Volume (million)							
Total	1,392.5	1,390.3	1,383.9	1,346.2	0.2%	0.5%	2.8%
Day	713.0	721.9	706.1	679.8	-1.2%	2.2%	3.9%
Overnight	679.5	668.3	677.8	666.5	1.7%	-1.4%	1.7%
Overnight Business	213.4	210.7	210.5	211.8	1.3%	0.1%	-0.6%
Overnight Leisure	466.1	457.6	467.3	454.7	1.9%	-2.1%	2.8%
Person-Stays Volume (million)							
Total	3,050.3	3,047.3	3,022.8	2,903.0	0.1%	0.8%	4.1%
Day	1,560.2	1,578.7	1,559.3	1,474.1	-1.2%	1.2%	5.8%
Overnight	1,490.1	1,468.6	1,463.5	1,428.9	1.5%	0.3%	2.4%
Overnight Business	342.0	337.2	327.4	325.5	1.4%	3.0%	0.6%
Overnight Leisure	1148.1	1,131.4	1,136.1	1,103.4	1.5%	-0.4%	3.0%
Person-Days Volume (million)							
Total	6,654.6	6,611.6	6,596.4	6,430.6	0.7%	0.2%	2.6%
Day	1,170.2	1,184.1	1,169.5	1,105.6	-1.2%	1.2%	5.8%
Overnight	5,484.5	5,427.5	5,426.9	5,325.0	1.0%	0.0%	1.9%
Overnight Business	1,234.2	1,223.9	1,203.0	1,199.6	0.8%	1.7%	0.3%
Overnight Leisure	4,205.3	4,203.6	4,223.8	4,125.3	1.1%	-0.5%	2.4%
Direct Spending (million)							
Total	\$770,853	\$727,583	\$700,188	\$679,003	5.9%	3.9%	3.1%
Day	\$134,530	\$131,654	\$124,119	\$119,639	2.2%	6.1%	3.7%
Overnight	\$636,323	\$595,929	\$576,069	\$559,364	6.8%	3.4%	3.0%
Overnight Business	\$190,427	\$173,872	\$167,058	\$165,476	9.5%	4.1%	1.0%
Overnight Leisure	\$445,896	\$422,057	\$409,011	\$393,887	5.6%	3.2%	3.8%



	Annual Totals				% Change		
	2007	2006	2005	2004	07/06	06/05	05/04
Consumer Confidence Index (base: 1985=100)	102.55	105.87	103.6	95.97	-3.1%	2.2%	7.9%
Real Gross Domestic Product (billions 000 \$)**	\$11,567*	\$11,319*	\$11,003*	\$10,676*	2.2%	2.9%	3.1%
Per Capita Disposable Personal Income**	\$28,641*	\$28,064*	\$27,492*	\$27,274*	2.1%	2.1%	0.8%
Per Capita Personal Consumption Expenditure**	\$27,396*	\$26,885*	\$26,330*	\$25,750*	1.9%	2.1%	2.3%
Consumer Price Index (base: 1982-1984=100)	207.3	201.6	195.3	188.9	2.8%	3.2%	3.4%
Travel Price Index	244.0	232.0	221.4	210.2	5.1%	4.8%	5.3%
Unemployment Rate	4.6%	4.6%	5.1%	5.5%	N/A	N/A	N/A

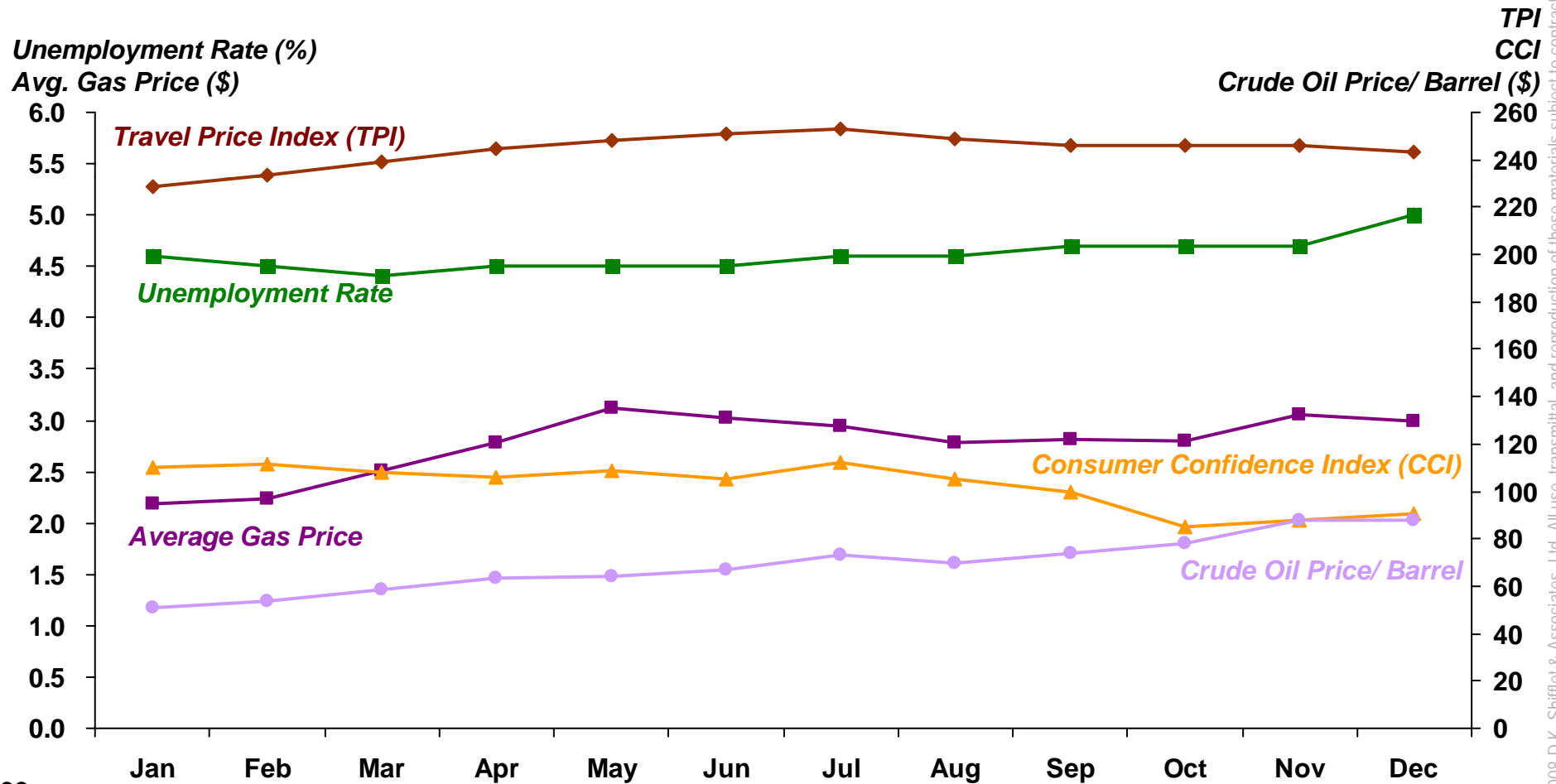
Sources: Economic Indicators - Department of Commerce Bureau of Economic Analysis
Travel Price Index – Tourism Industry Association (TIA)
Consumer Confidence Index – Conference Board Consumer Confidence Survey
* Numbers revised as of April 2008
** Represent Chained (2000) Dollars

2007 Economic Indicators Overview

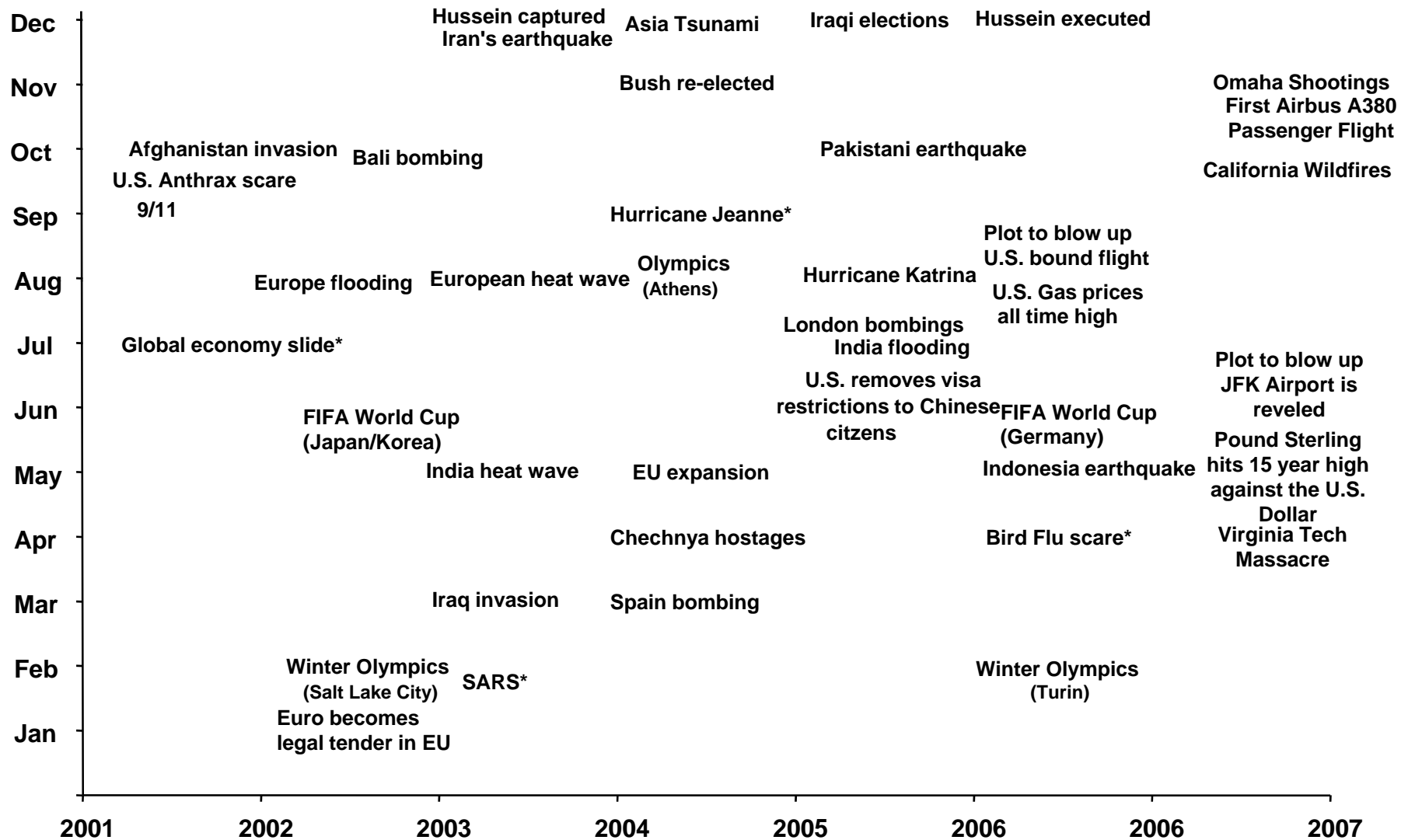


- The U.S. economy grew by 2.2% in 2007, a smaller growth rate in relation to previous years.
- Per Capita Personal Disposable Income was up 2.1% from \$28,064 to \$28,641. Despite the economy uncertainty, rising gas prices, and the housing market slump, Personal Consumption Expenditure grew at a slower rate than in previous years, reaching \$27,396.
- Consumer Price Index continues it's growing trend, increasing 2.8% to 207.3. However, the growth rate continues to decline for the second consecutive year.
- The Consumer Confidence Index fluctuated throughout 2007, ranging from a low of 85.2 in October to a high of 111.9 in July. However, the overall annual average stands at 102.6, a 3.1% decline over 2006.
- Unemployment rate remains unchanged at 4.6% for 2007, the lowest level since 2000.
- The average per barrel of U.S. crude oil hits an all time record at \$68.97 in 2007, ranging from a low \$50.77 in January to a high of \$88.14 in November. Conventional gas peaked in May, averaging \$3.12 per gallon nationwide. At the end of the year, gas prices had surpassed all previously established records, averaging \$2.77 a gallon, resulting in a 9.2% increase over 2006.
- Travel Price Index maxed out at 244.0, increasing 4.5% from 233.5 in 2006. A major catalyst in the overall growth in the Travel Price Index was the Air Travel Price Index, which at 117.1 surpassed the previous record of 116.7 reported in 2006. The Air Travel Price Index soared in 2007 as airlines cut backed on the number of flights, imposing fees for additional luggage while forcing passengers to pay premium rates to fly, in order to combat the rising costs of jet fuel.

2007 Economic Indicators



World Events Impacting Travel



2007 Recap of Other Travel Industry Events



National Headlines

The Passport Rule takes effect, as Americans traveling to Mexico, Canada and the Caribbean are required to present passports when arriving at U.S. ports of entry. However, due to the number of passport applications received, and multiple complaints, the Bush administration temporarily suspended the Passport Rule. As a result, U.S. citizens returning from abroad were readmitted by using a Department of State official proof of passport application receipt.

Americans are taking shorter vacations but are taking them more often. According to a TIA study, the average length of a vacation has dropped from about 5 days in the 1980's to less than 3.5 days now.

The U.S. market share of overseas travel continues to decline, costing the Country \$93 billion since 2000. As reported by the Discover America Partnership, poor U.S. entry process, such as unfriendly service and lengthy visa application process as top reason not to visit the Country.

Quarter 1, 2007

Consumer Confidence Index reaches a five year high in January.

The UNWTO announces a promotional campaign to target and develop the multi-billion dollar youth and student market, as youth tourism represents the fastest-growing sector of the travel industry, accounting for one-fifth of international arrivals.

Blizzard in Northeast and Midwest cause deaths, flight cancellation, while straining thousands of Business and Leisure travelers.

2007 Recap of Other Travel Industry Events cont.



Quarter 2, 2007

According to Meeting Industry Megasite, the U.S., for the third straight year, was the top country for international meetings.

As reported in the Chicago Tribune, Travel continues to be the biggest online retail category among Americans.

Based on the Energy Information Administration, the national average gas prices reach an all time high at \$3.22 a gallon.

Quarter 3, 2007

Gas prices hit a three month low.

President Bush signs bill that will improve America's security while enhancing the welcoming process at the Nation's top 20 overseas inbound airports, which welcomes nine out of ten overseas visitor.

Dollar hits its lowest mark ever against the Euro as one Euro traded for \$1.39.

Quarter 4, 2007

Based on Travel Weekly Magazine Americans spend record amount on travel insurance, reaching over \$1.3 billion, a 20% increase over spending in 2004.

Internet continues to influence travel planning as blog sites keep booming and influencing future travelers.

Oil surges to its highest price ever, reaching \$98 a barrel.

According to a TIA study, housing market turmoil and increasing subprime rates are affecting decisions among future Leisure travelers.

Based on the Commerce Department, the U.S. sets record high for international visitors and spending, attracting 56.7 million visitors spending \$122.7 billion.